



Town of Arlington Board of Selectmen

Meeting Agenda

February 22, 2016

7:15 AM

Selectmen's Chambers, 2nd Floor, Town Hall

PROCLAMATIONS

1. Proclamation: White Ribbon Day

CONSENT AGENDA

2. Reappointments: Cyrus Dallin Art Museum, Board of Trustees
Sarah Burks
Aimee Taberner
(terms to expire 1/31/2019)
3. Appointments of New Election Workers: (1) Susan Bernhard, 30 Eustis Street, D, Pct. 18; (2) Anthony Chella, 151 Mystic Street, U, Pct. 1; (3) Carol Curcio, 7 Newport Street, D, Pct. 21; (4) Carole DeVito, 42 Columbia Road, D, Pct. 21; (5) Alice Ronchetti, 33 Magnolia Street, U, Pct. 1

PUBLIC HEARINGS

4. 7:15 p.m. CDBG - Performance Update for Program Year 2015-2016
Jennifer Raitt, Director, Planning & Community Development
5. 7:15 p.m. Vote: CDBG Requests for FY2016-2017 Funding
Jennifer Raitt, Director, Planning & Community Development

APPOINTMENTS

6. Board of Library Trustees
Amy Hampe
(term to expire 1/31/2019)
7. Commission on Disabilities
Liza Molina
(term to expire 6/30/2017)
8. Cyrus Dallin Art Museum, Board of Trustees
Ann-Marie Delaunay-Danizio
Meghan McDavid
(terms to expire 2/28/2019)

LICENSES & PERMITS

9. Request: Sidewalk Fixture Permit

TRAFFIC RULES & ORDERS / OTHER BUSINESS

10. Discussion and Approval: Lake Street Recommendations
Jeffrey Maxtutis, TAC Co-Chair
Howard Muise, TAC Co-Chair
11. Request for Statement of Support/Non-Opposition - Medical Marijuana Dispensary
Massachusetts Patient Foundation
12. Net Metering Letter to Legislature
Ryan Katofsky, Sustainable Arlington
13. Community Compact - Endorsement of Best Practices
Adam W. Chapdelaine, Town Manager
14. Vote: Sponsorship of "Unconscious Bias" and "Stereotypes"
Mary Harrison, Vision 2020 Diversity Task Group
15. Vote to Adopt: Suburban Coalition Resolution re the Foundation Budget Review Commission
Paul Schlichtman, Chair, Arlington School Committee
16. Vote: Minuteman Building Project Assessment Task Force
Daniel J. Dunn, Selectman

WARRANT ARTICLE HEARINGS

Articles for Review:

Article 18: Bylaw Amendment/Expanding Equal Protection
Article 19: Bylaw Amendment/Arlington Human Rights Commission Executive Director
Article 20: Bylaw Amendment/Arlington Human Rights Commission Chairpersons
Article 21: Bylaw Amendment/Arlington Commission on Arts and Culture Membership
Article 25: Bylaw/Demolition by Neglect of Historic Buildings
Article 28: Vote/Authorizing Community Choice Aggregation

CORRESPONDENCE RECEIVED

Thank You Selectman Dunn
Mary Ellen Aronow, Arlington Tree Committee Co-Chair

NEW BUSINESS

EXECUTIVE SESSION

Next Scheduled Meeting of BoS March 7, 2016.



Town of Arlington, Massachusetts

Proclamation: White Ribbon Day

ATTACHMENTS:

Type	File Name	Description
▣ Reference Material	White_Ribbon_Day_2016.doc	White Ribbon Day 2016 Proclamation

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
JOSEPH A. CURRO, JR.
STEVEN M. BYRNE



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

PROCLAMATION

WHEREAS: The impacts of domestic violence reach many segments of our community, regardless of gender identity, age, race, ethnic origin, sexual orientation, or disability; and

WHEREAS: The particularly pressing problem of violence against women, sexual assault and domestic violence is recognized by both women and men in our community as a matter of deep concern; and

WHEREAS: The Town of Arlington, our Community Safety and Health and Human Services professionals, and our residents have exercised leadership in raising awareness about domestic violence, encouraging us all to be "upstanders," supporting survivors, and holding offenders accountable; and

WHEREAS: The White Ribbon Campaign was started in Canada in 1991 to urge men to speak out in opposition to violence against women; and

WHEREAS: The White Ribbon Campaign has spread to 60 countries and garnered 5 million signatures of support from concerned men; and

WHEREAS: The White Ribbon Day Pledge states: "From this day forward, I promise to be a part of the solution in ending violence against women and all gender-based violence"; and

WHEREAS: The White Ribbon Campaign has been endorsed by public officials and leaders in law enforcement, business, education, health care and athletics from throughout the Commonwealth of Massachusetts as a means of supporting a comprehensive approach to domestic violence.

NOW, THEREFORE, BE IT RESOLVED that the Board of Selectmen, do hereby express support for efforts - both local and beyond - to combat the scourge of violence against women; and be it further

RESOLVED that March 3, 2016 is proclaimed as WHITE RIBBON DAY in the Town of Arlington and that all residents are encouraged to pay fitting observance thereof; and be it further

RESOLVED that white ribbons - along with a copy of the White Ribbon Day Pledge - will be available in the Selectmen's office during the week of White Ribbon Day for all municipal officials and employees and members of the public who wish to express visible support.

**SELECTMEN
OF THE
TOWN
OF
ARLINGTON**

A true record.
ATTEST:

By: _____
Board Administrator



Town of Arlington, Massachusetts

Reappointments: Cyrus Dallin Art Museum, Board of Trustees

Summary:

Sarah Burks

Aimee Taberner

(terms to expire 1/31/2019)

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Dallin_reapp._recommendation.pdf	Board of Trustees recommendation, Meeting notices



February 4, 2016

Board of Selectmen
Attn: Kevin Greely, Chairman
Town Hall
Town of Arlington, MA 02474

Dear Selectmen,

The Board of Trustees of the Cyrus Dallin Art Museum at its meeting on 12 January 2016 recommended the reappointment of trustees **Aimee Taberner** and **Sarah Burks** for terms of 3 years. Their current appointments expired in May and December of 2015, respectively.

In addition, the Board of Trustees recommended the following new appointments: **Anne-Marie Delaunay** and **Meghan McDavid** to the Board of Trustees for terms of 3 years each. Each of these candidates have been very involved with the museum for over a year. They volunteer as docents, help with museum events, and attend board meetings.

The addresses of these candidates are as follows:

Sarah Burks
993 Mass Ave., #225
Arlington, MA 02476

Aimee Taberner
41 Wellington St.
Arlington, MA 02476

Anne-Marie Delaunay-Danizio
36 Curve St.
Waltham, MA 02451

Meghan McDavid
270 Highland Ave. #34
Somerville, MA 02143

Please let me know what additional information is required and when this matter may be scheduled for consideration. We appreciate your support and attention to this matter.

Sincerely,

Sarah Burks, Chair
Cyrus Dallin Art Museum Board of Trustees

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
JOSEPH A. CURRO, JR.



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 11, 2016

Sarah Burks
993 Massachusetts Avenue #225
Arlington, MA 02476

Re: Reappointment - Cyrus Dallin Art Museum, Board of Trustees

Dear Ms. Burks:

Please be advised that the Board of Selectmen will be discussing your reappointment to the above-named at their meeting to be held on Monday, February 22nd at 7:15 p.m. in the Selectmen's Chambers, Town Hall, 2nd Floor. Although it is not a requirement that you attend the meeting, you are invited to be in attendance.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script that reads "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
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TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 11, 2016

Aimee Taberner
41 Wellington Street
Arlington, MA 02476

Re: Reappointment - Cyrus Dallin Art Museum, Board of Trustees

Dear Ms. Taberner:

Please be advised that the Board of Selectmen will be discussing your reappointment to the above-named at their meeting to be held on Monday, February 22nd at 7:15 p.m. in the Selectmen's Chambers, Town Hall, 2nd Floor. Although it is not a requirement that you attend the meeting, you are invited to be in attendance.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script that reads "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr



Town of Arlington, Massachusetts

Appointments of New Election Workers: (1) Susan Bernhard, 30 Eustis Street, D, Pct. 18; (2) Anthony Chella, 151 Mystic Street, U, Pct. 1; (3) Carol Curcio, 7 Newport Street, D, Pct. 21; (4) Carole DeVito, 42 Columbia Road, D, Pct. 21; (5) Alice Ronchetti, 33 Magnolia Street, U, Pct. 1

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Election_Workers__Master_Records.pdf	Master Records

ELECTION WORKER'S MASTER RECORD

Date: 2/11/16

Check One: ☒ New Employee
☐ Change to Existing Employee

Vendor # _____ Position INSPECTOR
Name SUSAN BERNHARD Democrat ☒
Address 30 EUSTIS STREET Republican _____
Unenrolled _____
Zip Code 08476 Precinct 18
Alpha/Last Name _____ Phone # (617) 218-7948

Position Codes:	10 Warden	60 Deputy Clerk
	20 Deputy Warden	70 Teller
	30 Inspector	80 Substitute
	40 Deputy Inspector	90 Custodian
	50 Clerk	

ELECTION WORKER'S MASTER RECORD

Date: 2/17/16

Check One: ☒ New Employee
☐ Change to Existing Employee

Vendor # _____ Position INSPECTOR
Name ANTHONY CHELLA Democrat _____
Address 151 MYSTIC STREET Republican _____
APT. 3B Unenrolled ☒
Zip Code 02474 Precinct 1
Alpha/Last Name _____ Phone # _____

Position Codes:	10 Warden	60 Deputy Clerk
	20 Deputy Warden	70 Teller
	30 Inspector	80 Substitute
	40 Deputy Inspector	90 Custodian
	50 Clerk	

ELECTION WORKER'S MASTER RECORD

Date: 2/18/16

Check One: _____ New Employee
 _____ Change to Existing Employee

Vendor # _____ Position *Inspector*

Name CAROL CURCIO Democrat ✓

Address 7 Newpor Street Republican

Unenrolled

Zip Code 02476 Precinct A1

Alpha/Last Name _____ Phone # _____

Position Codes:	10 Warden	60 Deputy Clerk
	20 Deputy Warden	70 Teller
	30 Inspector	80 Substitute
	40 Deputy Inspector	90 Custodian
	50 Clerk	

ELECTION WORKER'S MASTER RECORD

Date: 2/18/16

Check One: ☒ New Employee
☐ Change to Existing Employee

Vendor # _____ Position Inspector
Name CAROLE DEVITO Democrat ☒
Address 42 COLUMBIA ROAD Republican _____
Unenrolled _____
Zip Code 02474 Precinct 21
Alpha/Last Name _____ Phone # _____

Position Codes:	10 Warden	60 Deputy Clerk
	20 Deputy Warden	70 Teller
	30 Inspector	80 Substitute
	40 Deputy Inspector	90 Custodian
	50 Clerk	

ELECTION WORKER'S MASTER RECORD

Date: 2/18/16

Check One: ☒ New Employee
☐ Change to Existing Employee

Vendor # _____ Position INSPECTOR

Name Alice Ronchetti Democrat _____

Address 33 MAGNOLIA ST. Republican _____

_____ Unenrolled ☒

Zip Code 02474 Precinct 1

Alpha/Last Name _____ Phone # 781-646-3359

Position Codes:	10 Warden	60 Deputy Clerk
	20 Deputy Warden	70 Teller
	30 Inspector	80 Substitute
	40 Deputy Inspector	90 Custodian
	50 Clerk	



Town of Arlington, Massachusetts

7:15 p.m. CDBG - Performance Update for Program Year 2015-2016

Summary:

Jennifer Raitt, Director, Planning & Community Development

ATTACHMENTS:

Type	File Name	Description
▢ Report	2015-16_Arlington_CDBG_Pgm_Final_Status_Reports_amended.pdf	2015-2016 CDBG Progress Reports

Arlington Boys & Girls Club
Sixty Pond Lane, Arlington, MA 02474

To: Board of Selectmen

From: Derek F. Curran, Executive Director

Date: 2/8/2016

RE: Report on CDGB Allocations

The following is the written status report for the 2015-16 CDGB allocation for the Arlington Boys & Girls Club.

Scholarship Program: The Arlington Boys & Girls Club was awarded \$14,500 for scholarships. The Club used the entire amount awarded to support 69 children attend summer programs. Summer is a difficult time for working parents and the scholarships program provide parents the opportunity to send their children to the Club where they know their children will have fun and be safe. I feel the goals of the program have been met. Each year we get more and more requests for scholarships and we do our best to give everyone qualified some assistance.

Jobs Jobs Jobs: The Arlington Boys & Girls Clubs total funding for the program was \$4000. The Arlington Boys & Girls Club has spent its entire \$4000 allotment on five teens in the summer of 2015. The teens in the program not only were able to earn some spending money but gained valuable job experience in a safe, fun atmosphere. I feel the goals of the program have been met. Most teens express an interest in continuing working during the school year which we cannot always accommodate due to funding.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
ANNUAL REPORT
FEBRUARY 2016

ARLINGTON YOUTH COUNSELING CENTER

Project Description: The Arlington Youth Counseling Center (AYCC) is a community-based, mental health counseling center serving children, adolescents and families living in Arlington. There are 300 active clients at AYCC, of whom 13% are children younger than 10, 32% are preteens between the ages of 10 and 14, 38% are adolescents between the ages of 15 and 19, and 17% are adults ages 20 or older. More than half of AYCC clients are low to moderate income. AYCC uses CDBG funds to provide critical mental health counseling, psychiatric services, and case consultation to income-eligible families who are uninsured or who have experienced a lapse of coverage, and to those who are unable to afford copayments and costly insurance deductibles.

Program Goals:

In accordance with its mission, AYCC strives to provide high quality mental health services, in a timely way, to any Arlington youth or family in need, regardless of their ability to pay. The following goals, which were included in the CDBG proposal, were established to this end.

Goal 1: *Low and moderate income youth and families will have immediate access to mental health counseling services and treatment.* Through the use of a part time intake coordinator, AYCC has consistently responded to all requests for services within 1-2 business days, and conducted intake assessments within 3 business days of initial referral. The referred client list is reviewed daily by AYCC administrators and case assignments are typically made within 5-7 business days of intake. However, the wait time can be slightly longer for more complex cases, those with special scheduling needs, and those with specific gender preferences in clinicians. To ensure prompt case assignments, AYCC oversees a robust team of fee-for-service clinicians, including 3 new hires in the past five months. In addition, to meet the demand for services more efficiently, AYCC increased the minimum client caseload requirement for all clinicians this past July.

Goal 2: *Clients on MassHealth will be evaluated regularly to determine behavioral health needs and strengths.* For all clients under the age of 18 who are insured by Mass Health, AYCC clinicians conducted Child and Adolescent Needs and Strengths (CANS) assessments during their initial (diagnostic) sessions, and followed up with quarterly CANS updates. Treatment plans were developed and reviewed for each client with consideration to CANS assessments. After every session, clinicians documented their client's progress towards treatment goals and objectives in the client's Electronic Health Record.

Summary and Need:

CDBG funds were used to pay for mental health counseling and psychiatric services for income eligible clients unable to afford the cost of treatment. To date in FY16, 10 clients (representing 7 families) received CDBG assistance for mental health counseling, case consultation, and psychiatry at AYCC. In total, they participated in 87 clinical sessions, utilizing \$7,690.20 of CDBG funding. In addition to supporting the full cost of sessions for uninsured clients and families, the CDBG grant helped fund clients whose insurance would not cover the cost of services at AYCC, as well as clients who were unable to afford the cost of copayments or substantial deductibles. Separately, AYCC provides thousands of dollars in additional free and reduced cost care to families slightly outside the CDBG income brackets who are also unable to cover the cost of services. Competing financial demands, along with crippling deductibles, copayments and coinsurance, are tremendous barriers confronting many of the clients at AYCC. CDBG grants are a critical source of funding that help enable AYCC to serve these clients, regardless of their ability to pay.



COUNCIL ON AGING
TOWN OF ARLINGTON
27 MAPLE STREET
ARLINGTON, MASSACHUSETTS 02476-4909
(781) 316-3400 fax (781) 316-3409



February 3, 2016

FROM: Susan R. Carp, M.S., Executive Director/COA

Susan Carp

TO: Laura Wiener, Acting Planning Director

RE: CDBG PROGRAM PERFORMANCE UPDATE – FIRST 7 MONTHS OF FY 2016

The Council on Aging is grateful for the CDBG funding that was awarded to the organization in FY 2016. Without these funds, the programs and services listed would not be possible as there are no other sources of funding. Please see the summaries below:

Dial A Ride & Senior Transportation: CDBG Funding \$40,000

Status: Funds will be expended by the end of FY 2016. The total funds used under the grant through December 31 are \$18,289.

The Dial A Ride program is one of the “family of services” that the COA Transportation department offers. Dial a Ride provides transportation 6 days per week for Arlington destinations. To date we have 75 Arlington seniors enrolled with the option of purchasing 10 taxi vouchers per month with an average of 159 rides per month. The COA Van operates 5 days per week and provides seniors transportation to Arlington destinations and medical appointments out of town. To date, we have 107 seniors utilizing the COA van for a total of 4,927 one way rides.

Over 50% of the seniors that utilize this Dial A Ride program also utilize the COA Van for their transportation needs. The additional benefit of the Dial A Ride program is that it provides transportation during periods when the COA office is closed, including Saturdays. The COA transportation services are the primary connector for those who no longer drive and the community in which they live; without this service our seniors would become isolated.

Adult Day Health: CDBG Funding \$4,000

Status: Funds will be expended by the end of FY 2016

The COA and Cooperative Elder Services, Inc. join together to identify and assist seniors in need of Adult Day Health Services. This grant provides 13 Arlington seniors up to \$300/year, access to services and respite care. The COA also provides a free care giver support group. Participants family members express gratitude for the \$300 scholarship which helps offset the staggering cost of caring for someone with Alzheimer’s and other neurological diseases.

Transportation & Volunteer Coordinator (One Position): CDBG Funding \$53,530
Status: Funds will be expended by the end of FY 2016

Volunteer Coordinator

The COA Volunteers supplement programs and services where budgets fall short. The COA utilizes approximately 130 volunteers per year with 85 volunteers providing service over 25 hours per year. For the first 7 months of FY16 the COA volunteers have participated in 37 programs. Of these 37 programs 927 individuals have received benefit for a total of 2,592 occurrences. The COA volunteers provide .73 FTE at the front desk and are often the first contact a senior has with the department.

The Volunteer Coordinator hosts a volunteer group called Coffee and Conversation which brings all volunteers together once a month to discuss their roles and insights. This program is highly revered among the volunteers.

Transportation Supervisor

The CDBG funds are used in a shared position with the Volunteer Coordinator. The COA transportation department is a highly used service and cannot be managed by volunteers. Currently there are 4 part time drivers and also includes 8 individuals under the volunteer Medical Escort program. The COA transportation service operates 5 days a week providing rides to seniors to a variety of locations. For the first 7 months of FY16 the transportation department has served 107 individuals for a total of 4,927 one way rides.

SKC

February 8, 2016

Community Development Block Grant Project Update
Arlington EATS Summer Lunch Program Summary

To The Arlington Board of Selectmen and Community Development Block Grant Committee:

Arlington EATS was awarded a Community Development Block Grant (CDBG) in the amount of \$1250 for the 2015 - 2016 funding year. This letter provides an update of the ways that Arlington EATS used these funds to the benefit of the community.

Each year over 500 Arlington students qualify for free or reduced priced meals during the school day. Arlington EATS (Eat All Through Summer) provides much needed food resources to students when school is not in session. This past summer, Arlington EATS offered our second year of the Summer Lunch Program. For 28 days during the summer (4 days per week for 7 weeks), Arlington EATS provided freshly prepared, delicious lunches free of charge to students and their families. In addition to providing freshly prepared meals, Arlington EATS supplied families with approximately 9,300 pounds of produce, bread, packaged and prepared foods provided to us through local food rescue organizations, grocery stores and community donations.

A statistical summary of the 2015 Summer Lunch Program is attached. We served an average of 210 meals per week for a total of about 1460 meals over the course of the summer. In addition, the food that the families brought home from the "pop-up pantry" distributions provided over 1000 additional meals. Volunteers offered over 500 hours of community service to make the program run smoothly.

Each meal is valued at \$3 (the cost of a school lunch) for a total of \$4380-worth of lunches provided. The CDBG will cover a portion of this cost. In addition to the meals served, the food that EATS was able to send home with families is valued \$15,996 (food rescue organizations value: \$1.72/pound). Arlington EATS is able to provide healthy freshly made meals at a low cost due to the generosity of community partners who donate or discount food for the program and the volunteers who are so generous with their time.

Arlington EATS is a volunteer-run, community-based non-profit organization. We are looking forward to our continued partnership with the schools, the Board of Selectmen and other town agencies, and our volunteers, clients and community partners.

Respectfully submitted by:

Lauren Ledger, Susan Stewart, Vicki Rose
on behalf of the Arlington EATS team

**Summary of 2015 Summer Lunch Program
Arlington EATS**

Monday, July 6 - Thursday, August 20
Thompson School Cafeteria

7 weeks, 4 days per week (28 days of lunches served)

Serving:

daily - between 30 and 72 meals served daily

weekly average - 210 meals served per week

summer total - 1460 lunches served this summer

“Pop-up pantry” distributions: food available each day to bring home
estimated 1000 meals provided for families from the daily “Pop-up pantry”

Total meals served out of Thompson School Cafeteria

(including lunches served and Pop-up Pantry)

Summer total - 2460 (approximately 2500)

Volunteer hours:

(on average)

8 volunteers daily

32 volunteers weekly

224 volunteers over the summer

18 combined volunteer hours daily

72 volunteer hours weekly

504 volunteer hours over the summer

Number of Pizzas consumed over the summer:

98 pizzas consumed

Community partners:

FoodLink

Arlington School Food Service

Whole Foods

Beaujolais catering

Trader Joe's

Food For Free

Arlington Food Pantry

My Brothers Place

La Victoria

Trinity Baptist Church

25 Medford Street
Arlington, MA 02474
781-648-2005
www.fidelityhouse.org



Edward F. Woods
Executive Director

FIDELITY HOUSE

Board of Selectmen
730 Massachusetts Avenue
Arlington, MA 02476

February, 2016

FIDELITY HOUSE MENOTOMY MANOR/CDBG PROGRAM UPDATE

July 1, 2015- June 30, 2016

“Alone we can do so little; together we can do so much” Helen Keller

Fidelity House has a sign over our door that echoes our role as a community center: “Goodwill to men, women and *all* children”. Part of the mission of the Community Development Block Grant is to ensure that services are provided to the most vulnerable in our communities. Together, we can do so much to provide and build up our community’s youth who reside in Arlington’s low income housing, Menotomy Manor.

The following is a review of our program goals and how we are utilizing the funding entrusted to us to maximize the program impact on each child that comes through our doors. The main barriers to participation, as expressed by the parents, revolve around finances and accessibility. Addressing those two needs are vital ingredients in the design of the Menotomy Manor Outreach Program.

Fidelity House will increase the opportunities and participation of the 5-18 year old youth by providing summer camperships, free transportation, on-site programming, free memberships and year-round, multi-faceted activities. The \$14,000 helped defray the program costs. 16 Menotomy Manor youth attended our Day Camps during the Summer Months for an average of 3 weeks of Day Camp. BUS transportation to/from Fidelity House for Day Camp was provided at **no cost** to the families. The on-site programming currently includes both transportation **to/from Fidelity House two days** a week (with 3 – 14 children attending weekly) and on-site programming an additional afternoon (with 3 – 10 youth attending weekly). We have already allocated out over \$3000 to cover the Free one year memberships (for grades 2 through high school) and scholarships to participate in sports & specialty youth programs.

Fidelity House will provide positive role models, familiar faces & dependable services to allow prevention/intervention programming to be effective for the youth. Fidelity House continues to provide programs year round and all the staff are well-known faces, providing consistent and positive role models for the youth.

Fidelity House will collaborate with parents, local schools, human service departments to provide the best prevention/intervention programming for the youth involved. Fidelity House continues to have positive interactions with the families that reside in Menotomy Manor, Arlington Housing Authority, Thompson School, Arlington Youth Consultation Center and the Department of Social Services.

We at Fidelity House truly believe that this program positively builds up the child, the families and ultimately, the community. We thank the Selectmen for allowing us the opportunity to remain a stable influence in this community and continue this program despite the ups and downs of the economy.

Sincerely,

Lisa Urben
Youth Program Director



**Food Link - Healthy Food Delivery to
Arlington Housing Authority Locations
FY 2015- 2016 Report
February 9, 2016**

Summary describing what has been accomplished in each of your programs during the current fiscal year

Elders, low income families with children, and people with disabilities often struggle to buy healthy food regularly. The cost of groceries, the cost of transportation to the store and the limited ability to carry heavy loads make it difficult for this population to get fresh food. As a result, this population often is not able to eat healthy food, negatively impacting their health.

In 2015, Food Link brought healthy food to this population on a regular basis. Food Link provided fresh fruits and vegetables, dairy and bread one to four times each week to residents of four Arlington Housing Facilities, including those living at: Chestnut Manor, Cusack Terrace, Drake Village, and Menotomy Manor. Food Link intended to deliver to Winslow Tower but they withdrew from the program partway through the year. In addition, Food Link brought fresh produce to participants in the Congregate Dining program provided by Minuteman Senior Services for low-income seniors (Central School location) at least twice per week.

These deliveries enabled elders, low income families with children, and people with disabilities to have regular, convenient access to healthy foods at no cost.

The amount of funds expended

During the time of the project, which was July 1, 2015 – June 30, 2016, we proposed to spend \$20,500. Based on 6 months actual expenses ended 12/31/15 (July 1, 2015 - Dec 31, 2015) and 6 months pro forma (Jan 1, 2016 - June 30, 2016), we expect to spend \$12,210. This difference is mainly due to the fact that Food Link combined the positions of Administrator, Volunteer Coordinator, and Quality Control Person into one position, an Operations Director. Due to funding constraints, this position could not be filled until November 2015. Please see attached budget for more details.

The number of persons served to date

Based on 2015 reports from the Arlington Housing Authority, Food Link provided healthy food to 1,144 people once per week or more throughout 2015. Food Link also delivered food at least twice per week that was distributed through the Congregate Dining program at Minuteman Senior Services, thereby reaching many more elders. As a result, Food Link far exceeded their goal to distribute food to 1,000 people in 2015.

A statement of whether or not the goals of the program are being met

Food Link has succeeded in providing a large amount of healthy food on a regular basis to those living in Arlington Housing Authority facilities and other seniors. We continue to meet our goal of providing at least 400 boxes of fresh produce, dairy and bread each month (4,800 boxes per year). We will work with staff to increase outreach so all residents are aware of these free food deliveries.

Assessment of the needs expressed by participants of your programs

The residents that we work with are always very appreciative of the free, healthy food that is delivered to their building by Food Link. Many residents work together to help bring in and arrange the food; they are happy for the community atmosphere and the opportunity to help others. We have heard that this food delivery is particularly helpful to residents during inclement weather.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
Program Beneficiary Data
July 1, 2015-June 30, 2016

Activity/Project Name: Food Link delivery to Arlington Housing Facilities

Number White 781

Number Black/African American 112

Number Asian 242

Number American Indian/Alaskan Native 9

Number Native Hawaiian/Other Pacific Islander _____

Number American Indian/Alaskan Native & White _____

Number Asian & White _____

Number Black/African American & White _____

Number American Indian/Alaskan Native & Black /African American _____

Number Other Multi-Racial _____

Number Hispanic 93

Total 1,144 (Please note that this may not total as this includes both race and ethnicity)

Please provide the number of persons for the applicable income categories:

0-30% (very low) of Median Income 500

(Please note that 0 – 30% of AMI in Arlington is 0 - \$29,500. Because of how the Arlington Housing Authority collects demographic information, we are using a range of 0 - \$24,999)

31%-50% (low) of Median Income 147

(Please note that 31 – 50% of AMI in Arlington is \$29,500 – 49,250. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$25,000 – 44,999)

51%-80% (moderate) of Median Income 46

(Please note that 51 – 80% of AMI in Arlington is \$49,250 – 78,800. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$45,000 and above)

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
Program Beneficiary Data
July 1, 2015-June 30, 2016

Activity/Project Name: Food Link delivery to Arlington Housing Facilities

Number White 781

Number Black/African American 112

Number Asian 242

Number American Indian/Alaskan Native 9

Number Native Hawaiian/Other Pacific Islander _____

Number American Indian/Alaskan Native & White _____

Number Asian & White _____

Number Black/African American & White _____

Number American Indian/Alaskan Native & Black /African American _____

Number Other Multi-Racial _____

Number Hispanic 93

Total 1,144 (Please note that this may not total as this includes both race and ethnicity)

Please provide the number of persons for the applicable income categories:

0-30% (very low) of Median Income 500

(Please note that 0 – 30% of AMI in Arlington is 0 - \$29,500. Because of how the Arlington Housing Authority collects demographic information, we are using a range of 0 - \$24,999)

31%-50% (low) of Median Income 147

(Please note that 31 – 50% of AMI in Arlington is \$29,500 – 49,250. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$25,000 – 44,999)

51%-80% (moderate) of Median Income 46

(Please note that 31 – 50% of AMI in Arlington is \$49,250 – 78,800. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$45,000 and above)

TOWN OF ARLINGTON

Director of Recreation



Joseph J. Connelly

RECREATION DEPARTMENT

To: Board of Selectmen

From: Joe Connelly, Director of Recreation

Date: 1/15/2015

Re: Report of CDBG Allocations

The following is the status report for current projects under the jurisdiction of the Park and Recreation Commission and the Arlington Recreation Department that are being funded through the Community Development Block Grant Program.

Recreation Scholarship Program: The Arlington Recreation Department was awarded \$13,000 to assist in its scholarship program. To date the department has dispersed \$13,000.00 to fifty-one individuals and families. In total the Recreation Department has received requests for over \$40,000 in programming so far this year.

Youth Jobs Program: Arlington Recreation, Fidelity House and the Boys and Girls Club to provide jobs for lower income youth share this allocation. Two individuals participated in the program through the Arlington Recreation Department. The total funding allocated for this program was \$4,000. As of the end of December we have awarded \$3,950 to two individuals.

ADA Accessibility for Buck Field, Cutter Park and Hills Hill Field: Arlington Recreation received \$14,000 to assist with the ADA accessibility of Buck Field, Cutter Park and Hills Hill Field. This project is currently in the design phase. The Town has contracted with the Berkshire Design Group for design services. These projects will be bid in the spring of 2016 pending available funding.

Ican Shine Learn to Bike Program: Arlington Recreation received \$1,200 to assist with this program. This program typically occurs during April school vacation period and therefore no funds have been expended at this time.

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Ted Fields

From: Melissa Dlugolecki <mdlugolecki@arlington.k12.ma.us>
Sent: Friday, February 12, 2016 11:59 AM
To: Ted Fields
Subject: CDBG application

Dear Ted,

Thank you for your continued support of our student-athletes. The funding from CDBG supports our scholarship program which allows student-athletes from low-income homes to participate in these important educational-athletic programs. To participate in athletics, an athletic fee is required for each sport to defray the cost of running programs. However, the fee can be a deterrent for many families. Through scholarships, we eliminate the financial barrier to participating in athletics, offering a fair platform for all students. As our registration numbers continue to rise, so do the number of athletes eligible for scholarship funds. The generosity the CDBG supplies keeps the free-reduced athletic fee sustainable for our programming. Scholarships given spread among various sports and all grade levels.

I look forward to working with you further on this and further positioning our students to qualify for the financial aid that makes a significant positive impact on their high school experience.

Sincerely,

Melissa

--

Melissa Dlugolecki

Athletic Director, CAA
Arlington High School
[Athletics Website](#)
Twitter: @GoPonders

COMMISSION ON DISABILITY, TOWN OF ARLINGTON

20 ACADEMY STREET, SUITE 203, ARLINGTON, MASSACHUSETTS 02476-6436 (781) 316-3431



Memo To: Board of Selectmen
Adam Chapdelaine, Town Manager

From: Jack Jones, Director of Housing & Disability Programs

Date: February 10, 2016

Subject: Status Report FY 2016 Curb Cut Ramp Project

During the first six months of FY 2016 LaRovere Design Build Co. installed sixty-one curb cut ramps using CDBG funding that totaled \$125,000.00 with an addition six ramps that totaled \$19,589.65 paid from Town Funds. Ramps from the FY 2016 Curb Cut Ramp Project were installed on the following streets:

CDBG Funded	Town Funded
Crosby St. Area: 17	Ridge St. Rotary: 6
Richfield Rd.: 9	
Oakland Avenue: 8	
Massachusetts Ave.: 2	
Wachusett Ave.: 4	
Paul Revere Rd.: 2	
Appleton St.: 3	
Mystic St.: 16	

The Commission on Disability appreciates the past support from the Board of Selectmen and the Town Manager and welcomes the opportunity to continue this project until all required curb cut ramps have been installed within the Town.



ARLINGTON HOME REHABILITATION PROGRAM
20 ACADEMY STREET, SUITE 202
ARLINGTON, MASSACHUSETTS 02476-6401

(781) 316-3436
FAX (781) 641-2103

Memo To: Board of Selectmen
Adam Chapdelaine, Town Manager

From: Jack Jones, Director of Housing & Disability Programs

Date: February 5, 2016

Subject: FY 2016 Status Report for the Arlington Home Rehabilitation Loan Program.

The Arlington Home Rehabilitation Loan Program (AHRLP) in FY 2016 continued to provide financial assistance in the form of low interest loans to upgrade and improve the living conditions for low and moderate-income Arlington homeowners of 1-4 family structures that meet general eligibility requirements. In addition to loans technical and contractor procurement services continue to be provided. These services included a home repair survey, work write-ups (a detailed list of all repairs to be done), cost estimates, evaluation of contractor proposals, and inspections of work in process and upon completion. The loans provided enabled the homeowner's to make home repairs and to correct violations of existing building code standards that could be detrimental to the health and safety of the occupants.

Many low-income homeowners live in homes in need of major or minor repairs to roofs, chimneys, gutters, foundations, walls, heating systems etc. These conditions present a serious risk to the health and safety of the homeowner. Often low-income homeowners do not have adequate savings and are unable to obtain bank loans to make necessary large-scale repairs. In addition, low-income homeowners that would be able to afford repairs, especially the elderly, worry about shoddy or incomplete work.

When a home in need of repairs receives assistance often other homeowners in the neighborhood will make repairs to their home, which enhances the appearance and pride of the neighborhood while increasing neighborhood property values and the quality of life in the Town. If necessary repairs are not made neighborhoods often decline which can result in social problems such as littered streets and increased crime.

Since July 2015, the AHRLP has provided five loans that total \$97,000.00 to eligible Arlington homeowners, whose properties needed repairs or improvements. The AHRLP is currently processing an additional five loans that will total approximately \$89,000.00. These ten loans will have provided assistance to twenty-four Arlington residents. The AHRLP expects an increase in loan production when the weather improves this spring.

The Arlington Home Rehabilitation Loan Program appreciates the past support from the Board of Selectmen, and Town Manager and welcomes the opportunity to continue to serve the residents of the Town of Arlington.



Housing Corporation of Arlington

20 Academy Street Arlington, MA 02476

tel: 781.316.3451

fax: 781.316.3614

info@housingcorporarlington.org

www.housingcorporarlington.org

Mission

Housing Corporation of Arlington provides and advocates for decent, affordable housing for low- and moderate-income families and individuals in Arlington and surrounding communities, while promoting social and economic diversity.

History

Housing Corporation of Arlington (HCA) was founded in 1986 in response to what was then perceived as out-of-control housing prices. Between 2001 and 2013, HCA has grown its affordable rental portfolio to 90 units in Arlington.

Since 2000, more than 500 grants totaling more than \$1,000,000 have been made to households through HCA's Homelessness Prevention Program (HPP). This program protects the most vulnerable in our community --the elderly, the disabled, single parents and families with young children--from becoming homeless or without safe or long-term housing options. Arlington is one of the only communities in the local area to have a safety net for those families and individuals in danger of losing their housing. HCA is proud to have pioneered this innovative program to keep people housed.

Major Programs

Affordable Apartment Program

Since 2001, HCA has purchased, rehabilitated and made available for low-income families and individuals 90 affordable apartments within two-family homes and small apartment buildings in Arlington. Scattered throughout town, our fifteen two-family houses offer ideal living environments for families with children, as they provide the scale of a single-family house with yards for play areas. HCA's nine other apartment buildings provide much-needed affordable housing for singles, couples and small families. All of these properties were improved and made lead-free. Most properties received significant energy upgrades. Our units are fully leased with many of our tenants remaining for 6 to 10 years. Our current waitlist has over 1000 households on it with more than 300 from Arlington.

HCA is committed to maintaining our current scattered site portfolio. During the past year, HCA spent \$56,000 for capital improvements on our existing portfolio, adding two new roofs, gutters, installing four energy efficient, gas fired boilers and 5 hot water heaters, new windows, masonry repairs and tuckpointing, and several new porches. These sustainability-focused improvements have significantly lowered utility costs for our tenants and guarantees the portfolio remains attractive, well kept and viable.

Housing. Community. Affordability.

For FY 2017, HCA requests \$150,000 in CDBG funds for additional energy efficient and sustainable capital improvements to help maintain these units as safe, decent and affordable housing.

In 2013, HCA completed its most ambitious affordable housing project in the organization's history, the completion of the \$10.8 million Capitol Square Apartments. The project is fully leased and now provides housing to 32 low income households. Two units are fully wheelchair accessible. The acquisition and redevelopment of these three apartment buildings required a complex combination of funding sources, which was recognized in 2013 by Novogradac Journal of Tax Credits with a national award for financial innovation.

Kimball Farmer House

In September 2014, HCA purchased the historic Kimball Farmer House at 1173 Mass Ave at the corner of Mass. Ave. and Forest Street. The property originally was built as a house, but has more recently been used as both office and residential. The Arlington Redevelopment Board approved HCA's request to reconvert the building to three affordable residential units. Construction is 50% complete. Rent up is anticipated by July 2016. Arlington has provided \$190,000 in CDBG funds for the project. Additional funds are from Leader Bank- \$350,000, Federal Home Loan Bank- \$100,000, State Historic Tax Credits sold to Brookline Bank- \$91,000, and the North Suburban Consortium HOME program- \$430,000.

20 Westminster Ave

HCA purchased the building and land at 20 Westminster Ave in Arlington, MA in March 2014. This brick structure at the intersection of Lowell, Westminster and Park Ave, was formerly a church and is now used by New Covenant Preschool on the lower two floors and the Arlington Belmont Crew Club on the top floor. HCA has just received approval under 40B comprehensive permit from the Zoning Board of Appeals to redevelop the building into 9 affordable rental units with no onsite parking. This transit oriented project was submitted to Massachusetts Housing Partnership in December 2014. Arlington CDBG committed funding in the amount of \$750,000. Brookline Bank has committed to a permanent first mortgage of \$650,000 and NSC has committed \$950,000 HOME funding. We are still looking for approximately \$1M in additional financing to start construction.

In HCA's Strategic Planning Update session held in June 2014, the organization recommitted to developing a pipeline of projects for additional affordable housing units to meet the increasing need. Our current waitlist is evenly split among households needing one, two and three bedroom units with lesser demand for studios or larger than three bedroom units.

HCA now maintains a portfolio of 27 buildings in Arlington.

1. New Project description—117 Broadway – Arlington Food Pantry

117 Broadway was purchased in September 2014 and is currently housing the Arlington Food Pantry's second location. Leader Bank provided a line of credit for the acquisition. The intent is to construct a mixed use building, commercial on the first floor and affordable rental units on three floors above. Some of the commercial space will be designed to be utilized by the Arlington Food Pantry. We anticipate 20 to 30 units of affordable housing and approximately 12,000 sq. ft. of commercial space. HCA will require CDBG funds of \$350,000 for predevelopment costs and potentially the acquisition of the adjacent lot in the coming year.

2. Downing Square at 19R Park Street, Arlington

HCA entered into a P&S agreement in September 2013 on a one acre parcel in Arlington. The site is located behind the CITGO station at the intersection of Park Ave and Lowell Street in Arlington and runs horizontally along the Minuteman Bike Path. The site has some significant environmental issues. HCA has defined the amount of environmental remediation required. The site is contaminated with polychlorinated biphenyl (PCB) and volatile organic compounds (VOCs). It is anticipated to cost approximately \$750,000 for the cleanup. At this time we are back in negotiations with the seller. CDBG funds of \$180,000 were granted to this project in 2014, no new funds are being sought for this project this year.

The number of opportunities open to HCA at this time is unprecedented. Taken together, these projects could create up to 70 new units of affordable housing over the next 3 years. That would increase HCA's portfolio of affordable housing in Arlington to 160 units.

Evaluation Process

Affordable Apartment Program. Most of our lenders have reporting requirements that include apartment inspections, income verification of tenants and ongoing due diligence. Arlington's Director of Housing inspects each apartment every 3 years on a rotating basis to comply with HUD regulations. Mass Housing Partnership requires annual inspections of its units as well as financial compliance. The Massachusetts Department of Housing and Community Development (DHCD) hires consultants to inspect the Capitol Square development and tenant files biannually. Our investors pay close attention our entire portfolio. The HCA Finance Committee reviews the project financials monthly and reports to the Board of Directors.

Brief polls of our tenants have shown that the energy improvements have cut their heating bills by 50% or more in some cases, and anecdotal reports are the heat is more even and the bills are spread throughout the heating season. These are all significant improvements for households on tight budgets.

Homelessness Prevention Program. A Review Committee of HCA's Homelessness Prevention Program (HPP) works with our Social Worker to determine if and when to provide grants to applicant households. The Review Committee is composed of a representative of HCA's Board of Directors, a representative of the Town's Council on Aging, and a third member appointed from the community.

This past year, HPP has assisted 84 individuals with community resources. In addition, the HPP program helped 25 households with grant funds of \$21,129 for security deposits, moving expenses and rent; 10 households have been referred to Mission of Deeds for free furniture; and 32 families were referred to area management companies for lower cost units or homes to purchase.

Three financial workshops were presented by staff from Cambridge Savings Bank, Belmont Savings Bank, and Leader bank. The workshops were attended by a total of 41 individuals. These workshops taught basic financing skills including budgeting, savings, retirement planning, and understanding credit scores and their impact.

In 2013, a Tufts University intern created a database of all HPP applicants and followed up with each grantee household to document how the household moved forward after their participation in the program. This program analysis revealed that of grantees responding, 95% are still housed and 65% continue to live in the same homes that our grants supported. The results are remarkable, and reveal how successful the program has been since 1991 in stabilizing households for the long term. HCA will continue to update the HPP analysis tracking how many households: inquired, requested assistance, completed the application, were approved, were denied, and have stable housing after receiving the grant.

In early May 2015, a terrible fire destroyed one building in the Brookside Condominium complex on Arizona Terrace, permanently displacing 26 households. Working in conjunction with Town Departments of Health, Council on Aging and the Town Manager's office, HCA set up a website to collect donations to assist the victims. Over 6 months HCA staff worked hard to find housing, negotiated trading rental vouchers for Housing Authority units, provided social services and just support, set up free furniture through Mission of Deeds, arranged for moving services for the furniture and funded security deposits, first month's rent and just a sympathetic ear often when the victims were dealing with anger, fear and shock. To date, all displaced tenants who request assistance have been housed and assisted in a myriad of other ways. Any remaining funds will be equally disbursed to fire victims to assist in their recovery.

Community Volunteers in Support of Community Initiatives

Vision 2020 Report on Accomplishments of CDBG Projects January 2016

In the fiscal year covering July 2015 to June 2016, Vision 2020 completed work on the 2015 Town Census Survey and initiated work on the 2016 Town Census Survey that will continue through July 2016. There is always some overlap in the work on consecutive surveys.

The 2015 Town Survey

As has been reported to Town Meeting and posted on the Town website, Vision 2020 received 6,058 responses to the 2015 Town Survey, “Help Shape the Future: Energy, Mobility, Business, Schools and the Arts.” The surveys were mailed to 18,910 households in Arlington; the return rate was 32%, an outstanding return that was nearly identical to the 2014 response.

The costs associated with the 2015 Survey were printing the survey to mail to each household and copying reports of the preliminary analysis of the results to distribute to Town Meeting in May 2015. All costs were incurred during Fiscal Year 2015, however volunteers often work over the summer to prepare a deeper analysis and full report for publication on the town website.

The 2016 Town Survey

In May 2015, Vision 2020 evaluated survey results from the past few years and the formats of the surveys to determine if any changes were needed. Given the continued high response rate, the decision was made to use the same format for Survey 2016 and continue to print and mail the survey to each household. The high return rate in the past few years indicates Vision 2020 volunteer efforts provide a valuable resource so participating organizations in town can make future plans based on current data.

A concern with out-dated software led to a full evaluation of the survey process that was led by the Town IT Department at the request of Vision 2020. The previous software had begun to generate errors and newer technologies were identified that could improve the survey by handling written comments and providing better reports and analysis. In addition, it was a goal to streamline the workflow to reduce the impact on the Planning Department where the scanning equipment is housed. New software was purchased in December 2016 and it is being used for the 2016 Survey. The funds for the software purchase were re-allocated from other parts of Arlington’s CDBG budget and approved for this purpose by the CDBG Committee and the Board of Selectmen.

Participating town groups for the 2016 Survey are the Council on Aging, the Recreation Department, the Human Rights Commission, and the Planning Department. The survey is titled “Help Shape the Future: Meeting Community Needs.” Each group submitted a number of questions that were evaluated to focus the final questions to yield answers that could be used to inform future work of the department or committee. This survey will capture baseline information regarding use of and awareness about Council on Aging programs for seniors along with opinions about the most useful programs; use of an existing dog park and opinions regarding the addition of new ones; information about the LGBTQ+ population in Arlington and the need for coordinated services; parking availability in the business districts; and opinions regarding precinct meetings leading up to the Annual Town Meeting.

The 2016 Survey was mailed with the Town Census to 19,317 households the second week of January 2016 and hundreds of surveys arrive every week to the Clerk’s office. Currently, Vision 2020 volunteers pick up completed surveys from the Town Clerk’s Office almost daily and review each individual survey for scanning readiness. Planning Department staff scan the prepared surveys. Volunteers record all comments written on or included with surveys and send these comments to the appropriate survey group.

Number of Households Receiving Survey/Survey Cost

According to the survey packager, the 2016 survey was mailed to 19,317 Arlington households with the Town Census. The rate of return will be determined by dividing the number of completed surveys returned by March 17, 2016 by this number.

The cost of printing the 2016 4-page survey is estimated to be between \$2,000 and \$2,200 based information from the printer and we assume there may be a modest increase in cost for 2017. Volunteers have already donated significant time to this effort, which will continue through June. The cost of copying the initial report for Town Meeting will be incurred in late April/early May 2016.

Next Steps

From February through June, Vision 2020 will continue or initiate these activities related to the 2016 Survey:

- Collect, prepare, and scan incoming surveys through March 17
- Report comments and trends to survey groups
- Conduct data runs, analyze data and determine what deeper analysis should be done
- Present an initial report on the survey observations at Town Meeting
- Complete data analysis and prepare final report for posting on the Town website
- Prepare individual reports for survey groups if desired
- Write articles on survey observations for The Arlington Advocate
- Make presentations as appropriate

In addition, problems with the survey software led to an evaluation of options for updated software that would enable better surveys and data analysis. In December, 2016 we purchased new software based on the recommendations of the Town IT Department.



TOWN OF ARLINGTON

MASSACHUSETTS 02476

781 - 316 - 3090

DEPARTMENT OF PLANNING and COMMUNITY DEVELOPMENT

MEMO TO: Adam Chapdelaine, Town Manager
Board of Selectmen

FROM: Laura Wiener, Acting Director of Planning *LW*

RE: CDBG Program Year 41 Performance Report, Planning

DATE: February 12, 2016

I am pleased to provide you with an update of program accomplishments for CDBG activities currently underway. The following is a summary of the activities under the direction of the Department of Planning and Community Development.

Affordable Housing: The Kimball-Farmer House (1173 Mass. Ave.) is under construction. It will be completed and occupied by the end of this fiscal year. It is an historic rehab. and will provide 3 units of affordable housing.

Façade Improvement Program: No money has yet been spent. There are four possible properties in the pipeline, in Arlington Heights and the East Arlington business Districts.

Planning and Zoning Study: Working with the Department of Public Works, funds will be spent on conceptual plans for Mass. Ave. in Arlington Center. As part of implementation of the Master Plan, funds were expended on a study to help with a zoning bylaw amendment to reduce the parking requirement for multi-family residential properties and mixed use properties. And funds were allocated for the Vision 2020 Survey.



Town of Arlington, Massachusetts

7:15 p.m. Vote: CDBG Requests for FY2016-2017 Funding

Summary:

Jennifer Raitt, Director, Planning & Community Development

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	2016-17_Arlington_CDBG_Proposed_Program_FFfinal.pdf	2016-2017 CDBG Funding Requests
▢ Reference Material	Ref_Mat._2.22.16_CDBG_FY2017_Funding_Requests_3.pdf	CDBG Spreadsheet 2016-2017 Funding Requests
▢ Reference Material	2016-2017_CDBG_AHA_#1.pdf	2016-2017 CDBG Funding Request Arlington Housing Authority, sec. 1
▢ Reference Material	2016-2017_CDBG__AHA_#2.pdf	2016-2017 CDBG Funding Request Arlington Housing Authority, sec. 2

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Boys & Girls Club, Inc.

Address: 60 Pond Lane

Telephone No. 781-648-1617

Fax No. 781-648-5064

E-Mail: dcurran@abgclub.org

Project Title: Jobs Jobs Jobs Program

Amount of Funding Requested \$ 5,000

Project Description:

The Jobs Jobs Jobs (JJJ program) provides teenage youth with an opportunity to gain valuable work experience. This program will allow for teenage youth to earn their own spending money and perhaps ease the financial burden that is placed on parents/caregivers.

Participants in the JJJ program will be part of our Junior Staff. The staff will provide teenage youth with skills to explore a variety of careers with an emphasis on human services, sense of business awareness, job readiness and employability skills.

The JJJ program participants will provide support to staff for a wide range of activities in the following core program areas (Education and Career Development; Health and Life Skills; The Arts; and Sports, Fitness and Recreation). All programs are designed to produce positive outcomes for youth and reinforce necessary life skills.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$4,000	July 16 – June 17

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
--------	--------	----------------

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Clients ages 14 to 19 whose families meet the income guidelines provided by CDBG and HUD.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents. Over 75 % of the clients live in Arlington.

Service Need

What need will be met by providing the proposed service to the community and the target population? The Jobs Jobs Jobs program (JJJ) provides resources and activities to teens ages 14 to 19 that help our Junior Staff to develop leadership, employment skills, and a sense of community responsibility as well as understand the value of a career in helping others.

What are the short-term goals and objectives for the contract period?

To provide our youth with an opportunity to gain work experience in a safe environment. This will allow for teens to work and earn a paycheck which they may not be able to do elsewhere because they are too young, inexperienced, or simply cannot find a job.

How will the target population be reached?

The target population will be reached via the Arlington Boys & Girls Club, local high school guidance departments and AYCC.

How will client eligibility be documented?

Clients (parents/legal guardians of youth workers) must meet income guidelines provided by CDBG and HUD. Clients will be expected to fill out an application and provide proof of income for the prior year. All records will be kept secure at the Arlington Boys & Girls Club.

How will the project be managed and staffed?

The Arlington Boys & Girls Club staff will be responsible for distributing JJJ applications and will distribute applications to those who may be interested and meet eligibility criteria set forth by CDBG and HUD. The Arlington Boys & Girls Club will be responsible for interviewing youth and hiring youth to work for the Club. The Club will be responsible for maintaining accurate records for each teenager it chooses to employ.

What is the timetable for delivery of services?
 Delivery of services is usually provided during summer months.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project (Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)	Anticipated Costs for FY 2016-2017
Job money for teens	\$5,000
Total Cost of the Activity/Project →	\$5,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Job money for teens	\$5,000

Total Amount of this Grant Request for FY 2016-2017 →	\$5,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$5,000
Total Funding for the Activity/Project →	\$5,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature *Kevin Flood*

Title *Assistant Director*

Name *Kevin Flood*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Boys & Girls Club, Inc.

Address: 60 Pond Lane

Telephone No. 781-648-1617

Fax No. 781-648-5064

E-Mail: dcurran@abgclub.org

Project Title: Boys & Girls Club Scholarships

Amount of Funding Requested \$20,000

Project Description:

The proposed funding will allow the Club to continue serving families who need financial assistance for child care and other programs. Each year becomes increasingly difficult for families to provide care for their children while they are at work. The requested funding will allow the Club to continue to provide top quality child care programs to children and families who need a helping hand. Each family will be required to meet income guidelines. Proof of income will be required.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

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Primary Beneficiary of Project

- ☐ Homeless Individuals
X ☐ At-Risk Children & Youth
☐ Elderly Individuals
☐ Individuals with Disabilities
☐ Low and Moderate Income Area
☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$14,500	July 16 – June 17

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
Donations	\$5,000	July 16 – June 17

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Client population differs year to year. This past year we served 35 families with over 80 children. Families that receive financial assistance from the Club must meet income guidelines. Children who live in public housing receive free or reduced membership.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents. Over 90% of clients live in Arlington.

Service Need

What need will be met by providing the proposed service to the community and the target population? Parents/Guardians need a safe place for their children to go and be active. The Club staff prides itself on providing programs/activities that help enhance the lives of children and shape their future. The club offers a broad range of programs in the following five core National Boys & Girls Club program areas: Character and Leadership Development; Education and Career Development; Health and Life Skills; The Arts; and Sports, Fitness and Recreation. All programs are designed to work towards positive outcomes for youth and reinforce necessary life skills. When children are at the Club parents know that their kids are in a safe place and are receiving positive direction from the staff.

What are the short-term goals and objectives for the contract period?

The Club provides many opportunities for families with children who benefit greatly from time spent at the Club. Children come to the Club to participate in many programs; programs such as Swim Lessons, Basketball, Games Room, Teen Room, STEM (Science, Technology, Engineering and Math), the Arts, Learning Center and more. Children also come to the Club to attend ABC Pre-School and the Afterschool Program.

How will the target population be reached?

The Club will reach the target population by working with other youth agencies, schools, Arlington Youth Consultation Center and Department of Children and Families. Other avenues that the Club will take to reach target population will include Facebook, Twitter and Patch, along with the Arlington Advocate and Arlington Shopper. Flyers will also be posted in and around town.

How will client eligibility be documented?

Clients will be required to meet income guidelines provided by CDBG and HUD. Clients will also be required to fill out and complete an application and provide proof of income from the prior year.

How will the project be managed and staffed?

The Club will have a designated staff member assigned to administer this project. This person will be responsible for collecting the necessary information from families seeking financial assistance as well as ensuring that all income criteria is met. All records will be kept in a secure location at the Arlington Boys & Girls Club.

What is the timetable for delivery of services?

Scholarships are granted on a first come first serve basis. Scholarship recipients use funds immediately for programs, usually during the summer months. Membership to the Club lasts for one year.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project (Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)	Anticipated Costs for FY 2016-2017
Scholarship Administrator	\$5,000
Support Staff	\$2,000
Scholarships for families	\$20,000
Total Cost of the Activity/Project →	\$27,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Scholarships for families	\$20,000
Total Amount of this Grant Request for FY 2016-2017 →	\$20,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 (for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$20,000
Donations from Individuals	\$5,000
Total Funding for the Activity/Project →	\$25,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature *Kevin Flood*

Title *Assistant Director*

Name *Kevin Flood*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Youth Counseling Center

Address: 670R Massachusetts Avenue; Arlington, MA 02476

Telephone No. 781-316-3255 **Fax No.** 781-316-3261

E-Mail: cleger@town.arlington.ma.us

Project Title: Mental Health Counseling and Case Management Services

Amount of Funding Requested \$20,000

Project Description: The Arlington Youth Counseling Center (AYCC) is a licensed, community-based mental health center serving Arlington youth (ages 3-21) and their families. AYCC provides a variety of high quality, innovative, and therapeutic outpatient mental health services, including individual, group, and family counseling, psychiatric consultation, and medication management. Demand for these services is great in Arlington, with some of the more common presenting concerns being depression, anxiety, social and behavioral issues, substance use, domestic violence, self-harm and suicidality. Untreated, these issues can have far-reaching and often debilitating effects on individuals, their families, schools, employers, and entire communities. However, in most areas across Massachusetts the availability of children's mental health services is scarce. As one of the only remaining mental health facilities dedicated to the treatment of community youth and families, and one of the only providers in the area that accepts youth with public health insurance, AYCC serves as a beacon of hope for hundreds of Arlington families. While the cost of providing treatment and other support services far exceeds insurance revenues and local funding allocations, AYCC remains committed to reducing financial barriers for Arlington families trying to access care. To this end, AYCC seeks grant funding, in part, to provide assistance to Arlington families who are uninsured, underinsured, or who are otherwise unable to afford weekly copayments or annual deductibles. Through a new Community Resource Specialist position, AYCC also offers case management services to AYCC clients and disadvantaged Arlington residents with critical resource needs, such as food, shelter and other emergency assistance. Ensuring that these basic needs are met is of vital importance, and essential to the social and emotional growth and wellbeing of AYCC clients. However, there are very few reimbursement opportunities for case management services, and AYCC is tasked with securing funding to support this critical position. Therefore, AYCC requests \$20,000 in CDBG funding to help cover the unpaid costs of providing counseling and psychiatric sessions to CDBG eligible families, as well as the cost of case management services for low income Arlington residents in need of food, shelter or emergency assistance.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:**

X Low/Moderate Income Clientele: the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:**

☐ **Slum or Blighted Area:**

☐ **Spot Blight:**

Primary Beneficiary of Project

- ☐ Homeless Individuals
X At-Risk Children & Youth
☐ Elderly Individuals
☐ Individuals with Disabilities
☐ Low and Moderate Income Area
☐ Other (please specify)

Program Funding

Identify and list amount of *prior* year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$10,122	7/01/15-6/30/16
DMH	\$150,000	7/01/15-6/30/16

Identify *other* funding sources (non-federal/private)

Source	Amount	Funding Period
Cummings Foundation	\$33,000	7/01/15-6/30/16
Health Insurance Reimbursements	\$264,000	7/01/15-6/30/16
Client Copayments	\$42,000	7/01/15-6/30/16
Fundraising	\$50,000	7/01/15-6/30/16
School Contract	\$40,000	7/01/15-6/30/16
Town of Arlington	\$120,000	7/01/15-6/30/16

Target Population

What are the characteristics of the client population to be served by this project?

There are roughly 300 active clients receiving mental health counseling at AYCC. Among them, 13% are children under the age of 10, 70% are preteens and adolescents between the ages of 10 and 19, and

17% are adults over the age of 20. More than half of these families are low to moderate income, including over 30% who have public health insurance. There are currently 19 active case management clients, 1/3rd of whom represent AYCC families. The remaining clients are adult residents of Arlington who were referred to AYCC by community partners such as the police, schools, and Council on Aging. The majority of these clients need assistance with applications for food stamps, housing, health insurance, or fuel assistance, and almost all are low income.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents. All AYCC clients are Arlington residents, with the exception of a seldom few (<2%) who attend Arlington Public Schools but who are not residents (for example, students in the METCO program). AYCC has provided school-based counseling to these students as well, when needed. All case management clients are Arlington residents.

Service Need

What need will be met by providing the proposed service to the community and the target population? Children, adolescents, and families in Arlington who are struggling to cope with mental health issues will have direct access to timely, high-quality, and community-based mental health services, regardless of their financial means or ability to pay. Currently, there are few other options for children's mental health services for low and moderate income families, and often there are significant financial and other access barriers (long wait times and extensive travel) preventing families from utilizing these services. AYCC provides easily accessible mental health counseling and psychiatric services to community youth and families, and helps to ensure, by offering free and reduced cost care and case management services, that both their mental health and critical resource needs are met. Likewise, Arlington residents who are struggling to meet their basic needs for food, shelter, health care etc. will be able to access case management services at AYCC. The community resource specialist will connect these residents to critical resources, and assist them in accessing needed services. CDBG funding will be used to pay for health insurance copayments, insurance deductibles, and uninsured sessions for low and moderate income families, as well as for case management hours dedicated to supporting low income Arlington residents access services they need.

What are the short-term goals and objectives for the contract period?

Goal	Objective 1	Objective 2	Objective 3
<u>Goal 1:</u> Low & moderate income families will have immediate access to mental health services and treatment.	Intake assessments will be completed within two business days of first client contact.	Clients will be assigned to a clinician within 5 business days of intake assessment.	AYCC's clinical team and clinical caseloads will be monitored on an ongoing basis to ensure sufficient capacity to meet demand for services.
<u>Goal 2:</u> Treatment will support positive social & emotional growth among clients and families.	Treatment plans will be individualized & based on sound therapeutic knowledge.	Progress towards treatment goals will be clearly documented in clients' electronic health records.	Treatment plans will be reviewed and updated annually, or more frequently as needed.
<u>Goal 3:</u> AYCC families and Arlington residents referred for case management services will secure food, housing and other critical resources as needed	An inventory of needs will be conducted on all case management clients during initial intake.	The community resource specialist will manage an up-to-date list of available resources to support the full range of client needs.	The community resource specialist will ensure that all critical resource needs identified during clients' initial intakes are addressed during subsequent sessions.

How will the target population be reached?

There are a number of referral sources that connect at-risk youth and families to AYCC. These include Arlington Public Schools, the Arlington Police, local pediatricians' offices and area hospitals, as well as youth-service organizations and other community members. Part of what is unique and most valuable about AYCC is the extent to which it is embedded in the community and responsive to its needs. Through its close connections with the schools, other Town departments, and local service providers, AYCC is able to identify and serve families who are unable to access services elsewhere. Likewise, AYCC relies on its existing community partnerships to identify and refer residents in need of case management services.

How will client eligibility be documented?

AYCC client eligibility will be determined and documented through an application process which requires copies of 2015 income tax returns, as well as general income verification methods. A separate file will be kept on each client who receives CDBG funding. Case management clients seeking housing, food, or insurance coverage are often required to provide proof of income as part of their applications; the community resource specialist will retain copies of these documents for proof of CDBG eligibility.

How will the project be managed and staffed?

The project is managed by the Executive Director of AYCC. The Director will work in partnership with the AYCC billing manager to identify CDBG eligible clients in need of support. Counseling and psychiatric sessions will be conducted by licensed clinicians, including salaried staff (psychologist, psychiatric nurse practitioner, and two licensed independent clinical social workers) and 18 fee-for-service clinicians. The Community Resource Specialist, who is also a licensed independent clinical social worker, will oversee all aspects of the case management services.

What is the timetable for delivery of services?

Services will be provided from July 1, 2016 through June 30, 2017.

1. Budget Information:**a) Total Costs for the Proposed Activity/Project:**

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Personnel costs (salaries, wages, and longevity)	\$376,903
Fee for service clinicians	\$195,000
Community Resource Specialist	\$50,000
Agency expenses	\$8,585
Total Cost of the Activity/Project →	\$630,488

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Co-payments or coinsurance for CDBG eligible clients	\$5,000
Full sessions for CDBG eligible clients who lack insurance coverage or who carry large out-of-pocket deductibles	\$9,000
Community Resource Specialist- hours dedicated to assisting CDBG eligible clients access housing, food, and other critical resources	\$6,000
Total Amount of this Grant Request for FY 2016-2017 →	\$20,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 (for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	
Grants	\$57,000
Insurance Reimbursements	\$270,000
Client copayments	\$48,000
Town of Arlington	\$120,000
Donations	\$96,000
School Contract	\$40,000
CDBG	\$20,000
Total Funding for the Activity/Project →	\$651,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature: 

Title: *Executive Director of AYCC*

Name: *Colleen Leger*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Council on Aging

Address: 27 Maple Street, Arlington, MA 02475

Telephone No. 781-316-3400 Fax No. 781-316-3409

E-Mail: scarp@town.arlington.ma.us

Project Title: Adult Day Health Services

Amount of Funding Requested: \$10,000

Project Description: To provide a subsidy for Adult Day Health Services for Arlington seniors.

According to data provided by the MA Healthy Aging Community Data Profile and the Alzheimer's Association, there are about 831 adults aged 65+ with Alzheimer's and related dementia's living in Arlington. Over 60% of caregivers in Arlington have to leave work early or go in late, or take time off, because of essential caregiving responsibilities. The Adult Day Health program offered by Cooperative Elder Services, Inc. (CESI) provides much needed respite for caregivers, so that they can go to work and not worry about their loved one's safety, or so that elderly spouses who are caregivers can get some rest during the day. Many of the clients' families express that they would not be able to take care of their loved one at home without the support of CESI in Arlington. Others say that they would have had to quit their jobs, resulting in significant financial losses, to care for their mother or father who has dementia or another chronic disease requiring full-time care.

Furthermore, 70% of the Arlington residents who attend the program are classified as low-income, with \$24,000 or less for annual income, and rely on support from MassHealth (Massachusetts Medicaid for impoverished seniors), the Veterans' Administration, and/or State Home Care funding from Minuteman Senior Services for basic necessities. Too often, clients have low-to-moderate income but are not eligible for funding from Minuteman or the VA, and would have to deplete all their savings to get on MassHealth. Without a viable source of funding, needs of many frail elders go unmet.

Access to scholarship funds could ensure access to Adult Day Health and nursing care, meals, and social services. Additional funds would mean that more elders could attend the program who have no other source of financial support and could have critical needs easily met by regular participation at CESI Arlington.

More scholarship funding could provide the following:

1. Offer more days of attendance for clients with an acute medical situation that requires daily monitoring by our nurses
2. Provide respite for a family caregiver who experiences a crisis and the elder needs to be at the program to maintain his/her safety
3. Give an additional day of attendance/week for current clients who need more supervision during the day or who are struggling with depression and live alone
4. Provide Adult Day Health services to more Arlington residents with chronic diseases like Alzheimer's, who would not otherwise have access to the program
5. Continue to provide community-based care to frail, at-risk elders to prevent frequent, avoidable hospitalizations and premature nursing home placement

CESI provides adult day health services to 123 Arlington seniors; 111 units of service for Arlington residents per week and about 5,020 units per year. Based on current funding financial assistance is provided to 13-15 Arlington seniors.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- x Elderly Individuals
- x Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$4,000	FY16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
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None

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The target population for this request is Arlington residents, 60 years and older which have memory impairment, including but not limited to Alzheimer's disease.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

All clients receiving benefit from this grant request will be Arlington residents.

Service Need

What need will be met by providing the proposed service to the community and the target population?

Cooperative Elder Services, Inc. (CESI) currently provides Adult Day Health services for Arlington residents who attend the program 3 to 5 days each week. Overall, CESI provides 111 units of service for Arlington clients each week, at 435 units a month and 5020 units of service per year. Services include skilled nursing care, a light breakfast, hot lunch and afternoon snack, handicapped accessible door-to-door transportation, therapeutic exercise and diverse activities, specialized Alzheimer's programming, socialization with peers for emotional health, caregiver support, and social services.

Currently, there are approximately 831 people living with Alzheimer's disease in Arlington, with 2200 family caregivers struggling to manage. Over 60% of caregivers in Arlington have to leave work early or go in late, or take time off, because of essential caregiving responsibilities. The Adult Day Health program offered by CESI provides much needed respite for caregivers, so that they can go to work and not worry about their loved one's safety, or so that elderly spouses who are caregivers can get some rest during the day. Many of the clients' families express that they would not be able to take care of their loved one at home without the support of CESI in Arlington. Others say that they would have had to quit their jobs, resulting in significant financial losses, to care for their mother or father who has dementia or another chronic disease requiring full-time care.

Critical needs for Arlington elders include community-based nursing care for chronic conditions, proper nutrition and hydration, safe and supervised environment for those who have dementia, socialization for seniors who live alone and are at-risk for depression and anxiety, among other situations. Most of the clients would not be able to remain at home safely, putting them at-risk for nursing home placement, if they were not able to attend Arlington CESI.

What are the short-term goals and objectives for the contract period?

Increase the number of individuals to receive adult day health services

How will the target population be reached?

The target population will be reached through a variety of Social Work outreach programs as well as referrals from neurologists with diagnostic codes for dementia and Alzheimer. The professional staff at CESI also provide referrals.

How will client eligibility be documented?

Each family member responsible for the cognitively impaired individual seeking assistance will complete a CDBG Client Beneficiary Form. For confidentiality reasons, the invoice for services will reflect a number that has been assigned to each Arlington resident 60 years and older.

How will the project be managed and staffed?

Social Work staff at the COA or at Cooperative Elder Services will identify those in greatest need. There are potential referrals for neurologists that have access to patients with neurodegenerative diseases.

The Executive Director is sent an invoice from Cooperative Elder Services. The invoice is reviewed and approved, then forwarded to the administrative assistant for payment by grantor.

What is the timetable for delivery of services?

Ongoing as identified

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Social Work	\$936
Intake and Referral	\$504
Admin Assist	\$840
Executive Director	\$328
CDBG Funding for Adult Day Health Services	\$10,000
Total Cost of the Activity/Project →	\$12,608

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
All funds will be paid to Cooperative Elder Services, Inc. with invoice	\$10,000
Total Amount of this Grant Request for FY 2016-2017 →	\$10,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$10,000
All Staff Salaries listed in 1 (a)	\$2,608
Total Funding for the Activity/Project →	\$26,208

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature 

Title: Executive Director

Name Susan R. Carp, MS

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Council on Aging

Address: 27 Maple Street, Arlington, MA 02476

Telephone No. 781-316-3400 **Fax No.** 781-316-3409

E-Mail: scarp@town.arlington.ma.us

Project Title: Transportation Enterprise Fund

Amount of Funding Requested \$ 65,059

Project Description:

The Council on Aging's Transportation Program is one of the most important services offered to seniors in Arlington. Transportation to medical appointments and local stores and services are an essential part in helping seniors to remain independent and in the community. In addition, transportation to the Senior Center programs affords elders regular contact with others, a shared meal, and new learning experiences that not only alleviate isolation but helps to mitigate depression.

The Transportation Program has three components: a subsidized taxi program for use within Arlington, two lift-equipped vans, which primarily transport elders to medical appointments and to the Senior Center, and a Volunteer Medical Escort Service with mileage reimbursement.

The in-town taxi service provides about 120 rides a month, serving 75 registered participants. The Council on Aging acts as an overseer- managing the program but contracting the actual service to a local taxi company. The taxi company is responsible for all expense relating to the running of its fleet, which provides service only within the Town of Arlington, Monday through Saturday.

The van component of the Transportation Program is comprised of two, 9 passenger lift-equipped vehicles. Office staff and volunteers take calls from clients requesting rides and the Van drivers and Van Supervisor schedule the trips. Four Council on Aging van drivers provide the rides to the Senior Center and the medical appointments and on Thursday provide rides for food shopping and errands. All van-related expenses (driver salaries, maintenance, fuel, repair, purchase of the vans) are the responsibility of the Transportation Enterprise Program. Ride cost to the Senior Center: \$1.50 participant fee each way, Ride Cost for out of town medical rides: \$20, and Ride Cost for in-town medical rides: \$7 round trip participant fee.

The Medical Escort program utilizes volunteers and the senior pays a \$20 out of town fee as well as tolls and parking. This program is utilized when COA Van transportation is not appropriate for the rider.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- x Elderly Individuals
- x Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$40,000	FY16
EOEA	\$200	FY16
Harry Barber Program	\$750	FY16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
Taxi Tickets	\$8,000	FY16
Van Fees Collected	\$5,800	FY16
Symmes Trust	\$15,000	FY16
Friends of ACOA	\$500	FY16
Volunteers (@ \$15/hr)	\$5,340	FY16
Sanborn Foundation	\$2,500	FY16

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Arlington residents, 60 years and older, primarily of low-moderate income status; also low and moderate-income disabled resident.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

All riders will be Arlington residents

Service Need

What need will be met by providing the proposed service to the community and the target population?

Goal 1: To provide transportation for Arlington seniors to medical appointments in order to remove barriers to access to health care to maintain and improve health status.

Goal 2: To provide transportation for Arlington seniors to the Arlington Senior Center to have access to Minuteman Senior Services Meals; a low cost meal option of a \$2 donation.

Goal 3: To provide transportation for Arlington seniors to the Arlington Senior Center to participate in programs intended to increase mental and physical well-being through socialization, exercise, education, nutrition, and volunteer activities.

Goal 4: To provide transportation to help the Arlington senior live a dignified and engaged life in the Town of Arlington for every day errands which also helps local commerce.

What are the short-term goals and objectives for the contract period?

- A. To continue to provide a low cost, accessible transportation option for seniors to engage life in the Town of Arlington. This includes errands, community service, congregate meals, physical activity, social programs, and education.
- B. To continue to evaluate and enhance the much needed transportation program for the seniors in Arlington.
- C. Implement a transportation policy for any individual utilizing the Council on Aging Transportation services.
- D. Evaluate each client in the Dial A Ride Program and the COA Transportation program to determine if they are a qualified referral for the MBTA's, THE RIDE, which would provide another low cost flexible transportation option.

How will the target population be reached?

The Council on Aging utilizes a number of methods to reach the senior population within our mission. A monthly newsletter (3,500 per month) is distributed by mail, specific drop off locations, delivered electronically through the Town website, and available within the Senior Center. In addition, the COA utilizes local cable programming to disseminate information. In our constant outreach efforts, we also network with other agencies to ensure transportation options are discussed.

How will client eligibility be documented?

All riders will complete a CDBG Client Beneficiary form.

How will the project be managed and staffed?

The Council on Aging has an Intake and Referral Specialist, a Transportation Coordinator (.4), and dedicated volunteers that assist in the marketing, collection of data, and registration for the Dial A Ride program as well as the Council on Aging Van program.

Dial A Ride is based on annual registration. Taxi tickets are purchased at the COA. Once registered and tickets purchased, the client is able to contact the Taxi vendor directly. This enables the department to offer an alternative low income transportation option without carrying the burden of high administrative costs.

The Council on Aging Van Transportation program is managed by paid staff and volunteers reduce administrative costs.

The Executive Director must be available to facilitate transportation needs when the staffing level and demands conflict.

What is the timetable for delivery of services?

Ongoing

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Salaries & Wages (Van Driver, PT Intake, PT Transportation Coordinator)	\$66,030
Longevity	
Uniform	\$400
Expenses	\$12,000
Dial A Ride Taxi	\$20,000
PT Van Drivers to cover additional needs, vacation, and personal time off	\$8,850
Admin Staff to process payments	\$1,400
Total Cost of the Activity/Project →	\$108,680

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Salaries	\$35,809
Longevity	
Uniform	\$400
Taxi Expense	\$20,000
PT Drivers to cover vacations, personal time, and extra hours	\$8,850
Total Amount of this Grant Request for FY 2015-2016 →	\$65,059

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$65,059
COA Transportation Program Fees	\$5,800
Dial A Ride Ticket Fees	\$8,000
Other State Revenue	\$200
Grants	\$15,000
Friends of Arlington COA	\$5,000
Total Funding for the Activity/Project →	\$99,059

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature 

Title: *Executive Director*

Name *Susan R. Carp, MS*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Council on Aging

Address: 27 Maple Street, Arlington, MA 02476

Telephone No. 781-316-3400 Fax No. 781-316-3409

E-Mail: scarp@town.arlington.ma.us

Project Title: Transportation and Volunteer Coordinator (28 hours)

Amount of Funding Requested \$56,253

Project Description: Transportation and Volunteer Coordinator

The Council on Aging's Transportation Coordinator/Supervisor of Volunteers position was created in 1990 by action of the Board of Selectmen. The Coordinator/Supervisor has a dual role – coordinating the agency's transportation program and recruiting, training and supervising the agency's many volunteers.

TRANSPORTATION COORDINATOR: The duties of the Council on Aging's Transportation Coordinator include supervising van drivers, assigning daily van routes and client lists, managing additions and cancellations, maintaining radio communication with vans on the road, coordinating rides through the Medical Escort program, managing the Sanborn cancer transportation program, overseeing the Dial-a-ride Taxi Program and formulating monthly reports, billing, and statistics.

COA Van transportation services, has a ridership over 200. Those individuals utilize the family of services such as the VAN, Dial-a-Ride Taxi, Medical Escort, and Sanborn for 11,538 collective rides.

SUPERVISOR OF VOLUNTEERS: Engaging seniors in civic responsibilities keeps individuals active in their community and more likely to age in place. Promoting civic engagement is a part of the aging initiatives through the Executive Office of Elder Affairs. The Council on Aging has more than two hundred twelve (212) volunteers who provide various services to seniors throughout the community. There are many COA programs that would not exist without the involvement of COA volunteers: Friendly Visitors, Tax Abatement Assistance, Fuel Assistance, Medical Escorts, Benefit Check Up, Office Assistants, LINKS Program, Thanksgiving Home-Delivered Meal Program, and others are supported primarily through the efforts of volunteers. Yearly, these individuals give on excess of 8,847 hours of service through such programs annually. If they were to be paid at an average rate of \$9, this represents a savings of more than \$79,623 to the Town. It is the responsibility of the Supervisor of Volunteers to recruit, train and supervise these volunteers.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☒ Elderly Individuals
- ☒ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$53,530	FY16
Municipal Longevity	\$560	FY16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
Harry Barber Program	\$750	FY15

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The program serves residents of Arlington, 60 years of age and older.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Only Arlington seniors age 60 years of age or older will have access to the transportation services.

Individuals who choose to volunteer for the Council on Aging are primarily Arlington residents, however there are roughly 5% from surrounding communities that want civic engagement in the town of Arlington. There are no age restrictions on COA volunteers.

Service Need

What need will be met by providing the proposed service to the community and the target population?

Through the Transportation Program seniors and the disabled will be able to access the community and its services at a reasonable cost for shopping, personal errands, socialization, work, medical appointments, volunteering, education, etc.

Through the Volunteer Program seniors will receive rides to medical appointments, get assistance with health insurance issues, link up with youth in their neighborhood for leaf-raking and snow-shoveling assistance, apply for property tax abatements from the Town, receive home visits to mitigate isolation and loneliness, etc. Our volunteers also help in each of the 80 programs a year that the COA creates. In addition, many of the Council on Aging's volunteers are seniors or disabled persons and as volunteers they benefit themselves by utilizing skills in service to others.

Engaging older adults in civic engagement is a mutual benefit for the health and well-being of the senior and for the Town of Arlington.

What are the short-term goals and objectives for the contract period?

How will the target population be reached?

Transportation: The target population is reached in a number of ways; word of mouth, monthly newsletter, social work staff in/outside of the COA, flyers for programs, newsletter, community cable programming, by seeing the COA van throughout Arlington.

How will client eligibility be documented?

The Transportation client will complete a CDBG Client Beneficiary Form that will be maintained in a locked file.

All Volunteers complete an application and are CORI'ed and are interviewed by the Volunteer Coordinator and the Executive Director for appropriate placement. Volunteers are given job descriptions and supervision. The COA Volunteers record hours "worked" and that information is reported to the Executive Office of Elder Affairs as well as to any grantor.

How will the project be managed and staffed?

The Transportation and Volunteer Coordinator will perform most functions within 28 hours/week. The Intake and Referral Specialist, COA Social Worker, COA Administrative Staff, and the Executive Director will assume the 7 hours/week of operations that exceed funding for this position. Additionally, volunteers are trained to assume appropriately assigned duties.

What is the timetable for delivery of services?

Ongoing

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project (Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)	Anticipated Costs for FY 2016-2017
Intake and Referral Specialist	\$2,592
Social Worker	\$1,014
Admin Assistant	\$3,220
Harry Barber Participant	\$750
Executive Director	\$3,936
Van Drivers serve as back up scheduler	\$800
Transportation and Volunteer Coordinator	\$56,253
Total Cost of the Activity/Project →	\$68,565

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Transportation and Volunteer Coordinator	\$55,693
Longevity	560
Total Amount of this Grant Request for FY 2016-2017 →	\$56,253

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$
Total Sum of Staff Salaries listed in 1 (a)	\$12,312
Total Funding for the Activity/Project →	\$12,312

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title Executive Director

Name Susan R. Carp, MS

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title Co-chairs of Arlington EATS

Lauren Ledger (submitted electronically)

Susan Stewart (submitted electronically)

Name

Lauren Ledger

Susan Stewart

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington EATS (Eat All Through Summer); under the fiscal umbrella of the Town of Arlington Health and Human Services Charitable Organization

Address: c/o The Thompson School, 187 Everett Street, Arlington, MA 02474

Telephone No. 857-205-5215(Susan Stewart); 617-365-4877 (Lauren Ledger)

Fax No. 781-316-1419 (Thompson School)

E-Mail: info@arlington-eats.org

Website: www.arlington-eats.org

Project Title: Arlington EATS: (Vacation Lunch Program)
Feeding Arlington Students in Need When School is Out

Amount of Funding Requested \$6,000

Project Description (summary): Founded in May 2014, Arlington EATS maintains a clear goal: ensuring that the over 500 local students who receive free and reduced price lunch (FRL)¹ when school is in session still have access to healthy meals when school is not in session. We address the need for supplemental food by doing the following:

- Serving free lunches during summer & school vacation weeks
- Sending home fresh produce and other staples in our Weekend Food Program
- Making snacks available for any student who is hungry during the school day.

We bring together those struggling with food scarcity and those concerned with food justice and give them a welcoming, respectful place to work together to end hunger. We work closely with other area food organizations, including local food rescue groups. In the last year, these groups have provided us with over 34,000 pounds of fresh produce that we, in turn, provided to our families. Arlington EATS is proud of our all-volunteer model, allowing residents of all ages to give of their time and money in a hyper-local way, meaning that the money they give is going to kids living in their own neighborhoods.

The CDBG would help us grow our summer lunch program so we can help an even greater number of qualifying Arlington students.

For further details, please see the attached Executive Summary.

¹ a family of four makes less than \$44,863.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☐ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$1250	2015-2016

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
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A	B	C	D	E
Income		Projections	2015/16 actual (ytd)	2014/15 actual
Small individual donations		\$15,000	\$11,710	\$13,597
Business Donations		\$7,500	\$2,700	
CDBG		\$1,250	\$1,250	
Spring Fundraiser		\$12,500		\$12,000
Total Income		\$36,250	\$15,660	\$25,597
Expenses		Budget	2015/16 actual (ytd)	2014/15 actual
Summer Lunch Program		\$9,938	\$4,600	\$3,550
Weekend Food Program		\$10,000	\$315	\$3,273
Feb/April Vacation Lunch Program		\$2,600		\$200
School Snack Program		\$8,000	\$450	\$1,640
Overhead/marketing/paper goods, etc.		\$3,054	\$500	\$2,070
Total Expense		\$33,592	\$5,850	\$10,733
Income less Expense			\$9,810	\$14,864
Cash on Hand (November 2015)			\$24,674	
**Fiscal Year: July 1-June 30				

Gifts in Kind difficult to quantify* May 2014 - present

*From the start of Arlington EATS operations, we have received weekly donations of food items in great quantity through Food Link, Food for Free, Whole foods, the Arlington Food Pantry and food drives conducted around the community. Over the last year we have received and redistributed over 34,000 pound of donated food, valued at over \$50,000.

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Beneficiaries of the Arlington EATS program

Students

Over 500 students in the Arlington Public Schools receive free and reduced price lunch and breakfast on school days. When school isn't in session, families are forced to make hard choices about food purchases. Food assistance programs available to these families often don't include fresh fruit and vegetables. Through our Vacation Lunch Programs, Weekend Food Program, and School Snack Program, Arlington EATS helps these students and their families.

District-wide, approximately 11% of students qualify for free and reduced-priced meals (over 500 students), with a significantly higher percentage present at the Thompson School (28% of students qualify). The Thompson School district includes Census blocs with some of the lowest household incomes in Arlington. Residents of Menotomy Manor must meet federal guidelines for housing eligibility and include disabled individuals. While Arlington EATS has focused our efforts in the Thompson School district for our first year, we are also providing snacks for all the Arlington Elementary Schools and High School and provide Weekend Food Bags for 6 students who attend the Dallin school. In addition, we have established volunteer contacts at all of the Arlington schools and look forward to expanding our reach in the near future.

The Environment/ Food Rescue and Recovery

Arlington EATS helps local businesses and food rescue organizations find an end use for their recovered food. In a given year, the United States disposes of 133 billion pounds of uneaten food, an amount which could feed 25 million Americans. 10% of that disposal occurs at grocery stores². Food rescue organizations have begun to step in to prevent this food from ending up in landfills, reclaiming and redistributing thousands of pounds of food each month. However, these food rescue operations need local networks to get the food into the hands of those who need it. Arlington EATS functions as a "second harvest" for donated food that might otherwise go uneaten. Additionally, it helps local businesses, like grocery stores and restaurants, reduce their waste stream while simultaneously giving back to the community.

Volunteer and Donor Network

Arlington EATS is meeting another social need by depending upon and empowering a local volunteer and funding network. Arlington EATS provides an opportunity for people to donate money on a hyper-local level, with funds that go right back into the community. Also, many studies have shown that volunteering has demonstrable mental health benefits. Town members of all types find real value in being able to volunteer for Arlington EATS. Volunteers are absolutely necessary to organize and operate every aspect of the program, from packing food bags or serving lunches, to shopping for snacks. Several generations of one family, people who benefit from the program itself, or residents who can only commit to a few hours per month all find purpose and welcome in this organization.

² <http://www.businessinsider.com/why-grocery-stores-throw-out-so-much-food-2014-10>

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

All clients are residents of Arlington.

Service Need

What need will be met by providing the proposed service to the community and the target population?

The purpose of Arlington EATS is to provide meals to students in need when school is not in session. Arlington EATS is fortunate to work with the Arlington Food Pantry, with whom we collaborate closely and share a reporting structure through the Arlington Health and Human Services Charitable Corporation 501(c)3. However the two organizations take a slightly different approach to the problem of hunger. Arlington EATS focuses solely on replacing meals that students miss out on when school is not in session. This well-defined mission allows us to meet the needs of our focused clientele in a familiar and comfortable setting--their school. Students, regardless of potential household insecurities and inconsistencies, can rely on the predictability of knowing where their next meal is coming from. By helping the children, we also have a conduit to the other members of the household and we supply food to them through the Weekend Food Bag program.

In addition, Arlington EATS provides a "second harvest" for donated food that might otherwise go uneaten. Approximately 40% of food (about \$165 billion worth) is thrown out in the United States every year. All of this uneaten food could feed 25 million Americans. Arlington EATS helps local businesses reduce their waste stream while giving back to the community. We provided a welcome end-use for our partners at Food Link and Food for Free who reclaim and redistribute thousands of pounds of food per month.

Finally, many members of the Arlington community want to volunteer and would like to involve several generations of their family, or want to commit fewer hours per month than required by other volunteer opportunities. Arlington EATS fills this need.

What are the short-term goals and objectives for the contract period?

During 2016 - 2017, we seek to expand our services by 50 - 60% by reaching more of our students in need, and their families. During the summer of 2015, we provided lunch for approximately 60 students and family members per day, 4 days per week, with weekend food bags going home to supplement food resources for the remainder of the week. For the summer of 2016, we are targeting 80 to 90 meals served, 4 days per week, with continued distribution of weekend food bags.

Here is a summary of additional 2016 - 2017 program year goals (beyond the Summer Vacation lunches):

- 250 student meals per week for students at summer day camp(66% increase)
- Targeting 60 to 80 weekend food bags during school year (double the 2015 number) - This target may significantly change/decrease with expanded operation of the second Arlington Food Pantry Location.
- Continued support of the Snack program at all 7 elementary schools. During the 2015 - 2016 we expanded the snack program into all 7 elementary schools (up

from 3 schools in 2014 - 2015) and into the high school. We hope to expand the service into the middle school.

- 80 to 100 meals per day for February and April Vacation (up from an average of 55 meals per day in 2015)

How will the target population be reached?

We reach our target population through the local schools. We rely on the Principals, Administrative Assistants and Social Workers to encourage students in need to participate in the program. The vacation lunches and weekend food bags operate on an opt-in program where an invitation goes out to the school community and families sign-up to participate.

We reach out through extensive e-mail and social media networks. We have recruited residents of Menotomy Manor to spread word of the program within their personal networks. Local churches also assist in promoting the program to their members.

How will client eligibility be documented?

Our programs are designed to be inclusive, respectful and community oriented, and as such, we do not turn students or families away who request weekend food resources or come for vacation lunches. The Arlington School Food Services Department maintains a confidential database of students/families who qualify for free or reduced-price school meals. Though Arlington EATS does not have access to these lists for privacy reasons, those who do are able to encourage students and their families to take part in our program. When students/families opt-in to our program, a member of the school administration assigns them a number that we use to track their use of the program, while maintaining privacy.

How will the project be managed and staffed?

Arlington EATS is fortunate to have a talented core of leaders and volunteers—none of whom receive any monetary compensation. Through our community outreach, we have recruited a broad pool of volunteers of all ages who collect, retrieve, purchase, organize, and distribute food. At times, we contract through the school food services department for preparation and serving of vacation lunches, paid for by Arlington EATS.

What is the timetable for delivery of services?

Funding from the CDBG program would be used to partially fund our seven-week Summer 2016 program (July 5, 2016 through August 18, 2016). Arlington EATS will continue to offer services throughout the school year as described above.

1. **Budget Information:**

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2015-2016
2016- 2017 Arlington EATS Budget Summary (Projected)	
- Summer Lunch Program w/weekend food bags	\$ 8,960
- EATS grants to feed campers at Arlington day camps	2,000
- School snack program (providing up to 500 snacks per week at 9 schools)	8,000
- Weekend Food Bags (20 weeks)	10,000
-February and April Vacation lunch program	2,600
-administration (printing, postage, website, social media outreach)	3,000
Total projected budget for 2016-2017 Arlington EATS (all programs)	\$34,560
Total Cost of the Activity/Project →	\$34,560

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2015-2016	Amount
Summer 2015 Vacation Lunch program:	
7 weeks (July 5 - August 18), 4 days per week plus weekend food bags	
estimating 80 student meals per day at \$4 per meal	\$ 8,960
All funding goes directly to provide food for students, not to administration or overhead	
Minus donations sought from the community	-\$2,960
Total Amount of this Grant Request for FY 2015-2016 →	\$6,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2015-2016 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	
	\$ 6,000
*Donations from Interfaith community (local church contributions)	2,000
*Individual donations from general appeals and awareness campaigns	8,000
*Major community fundraising events	5,000
*Numerous small fundraisers (bake sale, town day, Feast of the East, etc...)	8,000
*In-kind donations from local food vendors, restaurants, caterers, food drives, partnership with Arlington Food Pantry, Food Link, Food for Free, which reduces the amount of food that we directly purchase.	6,000
*All of these are estimates of the fundraising that must occur.	
Total Funding for the Activity/Project →	\$ 35,000

Please see attached supplemental material:

- Executive Summary: Arlington EATS
- Programs and Services (Detail)
- Testimonials from Recipients, Volunteers, Teachers/Administrators, Donors
- Promotional/Informational Flyer
- Photos

Executive Summary: Arlington EATS

Mission statement: *To ensure that Arlington students from food insecure families have enough to healthy food to eat during the school day, on weekends, during school vacations and in the summer when school is out.*

Unlike a typical food pantry, EATS focuses solely on replacing meals that eligible students miss out on when school is not in session. The 500 students targeted in Arlington thus have their needs met in a familiar and comfortable setting: their school. Students, regardless of potential household insecurities and inconsistencies, can rely on the predictability of knowing where their next meal is coming from. Situated in their local school, students feel confident accessing food in their own cafeteria, from familiar teachers or volunteers.

By helping Arlington children, we also have a conduit to the other members of the household, supplying food to the whole family through the Weekend Food Program. Thanks to local food drives, individual food donations, and our partnerships with local food sources, this program regularly serves about 45 families each week. Unlike many food pantries which stock only non-perishable items, Arlington EATS is always able to include a variety of fresh fruits and vegetables, replacement meals for breakfast and lunch (eggs, poultry, milk, cereal, bread etc), in addition to the typical shelf-stable items. We work with local food partners that donate healthy rescued food as well as buy other needed foods from local vendors to fill the gap of food. Our expertise consists in collaborating with local non profit food rescue organizations and schools, just in time delivery of free food to schools and organizing volunteers in the school to distribute the food as it is delivered.

Arlington EATS does not limit food accessibility to the income-eligible students; anyone can get a snack or come to the vacation lunches. In this way, accessing free and healthy food is normalized for students, rather than potentially seen as a stigma. Our client families build deeper ties to their local school community through the support they receive with Arlington EATS programs. Parents who receive food often volunteer for the program themselves. In this way, rather than an "us and them" mentality in the school or town, Arlington EATS creates an inclusive community. Furthermore, any local resident wishing to volunteer feels engaged by working on something so fundamentally important to their own town.

Lack of access to reliable and healthy food affects all aspects of a child's physical, mental, cognitive, and social development. Childhood obesity is epidemic across all socio-economic groups, but for those with limited financial resources, the struggle to stay healthy and active is even more challenging. Multiple studies have found that children from lower-income households had more than two times higher odds of being obese than children from higher-income households. This finding is not surprising when we consider that the price of a bag of potato chips is often less than the price of buying a piece of fresh fruit (assuming such an option is even available at a local convenience store.)

Programs and Services

After forming in the spring of 2014, we have grown to operate through 4 primary programs: Summer Lunches, February and April Vacation Lunches, School Snacks, and the Weekend Food Program.

1. Summer Vacation Lunch Program: EATS serves a hot lunches from 12-1, Monday-Thursday. We often have free clothing, toys and books as well as food to take home.

- Provided 2,460 meals at the Thompson School over 7 weeks of 2015.
- Provided funding for 2,900 meals at the Boys and Girls Club drop-in program

2. February/April Vacation Lunches: EATS serves a hot lunches out of the Thompson Cafeteria from 12-1, Tuesday-Friday. These lunches are often catered by local restaurants and caterers.

- Served 220 meals per week during February and April 2015

3. Snack Program: Arlington EATS has snacks available at all elementary schools for any student who is hungry.

- Distributed over 7,000 snacks at Thompson during the 2014/2015 school year
- Helping to develop snack programs at the Arlington Elementary schools

4. Weekend Food Bags: EATS hosts a 'PopUp Food Pantry' at Thompson on the 2nd and 4th Fridays of the month. Typically, two complete meals and fresh produce is available.

- Provided ingredients for 4440 meals
- Consistently served 80 families during the school year

All four programs distribute fresh produce and rescued food from Food for Free in Cambridge and Food Link in Arlington; over the last year, we distributed 34,000 pounds, valued at over \$50,000

Our unique value added proposition is providing food that is healthy, fresh and primarily rescued from local farms and vendors, to pockets of food insecure students and their families in a manner that is responsible and respectful within the school environment using local volunteers.

In our first year for the period of September 2014 through September 2015 we have 29,804 lbs going to Arlington EATS from Food for Free. They calculate rescued food at the rate of \$1.72/lb so the total dollar amount would be \$51,262.88.

The cost to administer most of our programs is minimal. The majority of the food we serve or distribute is donated by Food For Free / Food Link or excess school year food that the Public School Food Service Department has given us for Summer Lunches. In all of these cases, this food would be thrown away without a group who could use it or redistribute it to those in need. Arlington EATS creatively addresses an array of needs throughout the community.

Recipient testimonials

Sometimes we have to choose between paying rent or buying food. Arlington Eats has helped my family tremendously in defraying the cost of food. ---food recipient

The Arlington EATS programs have helped my family in so many ways.. We are so grateful for the EATS program if it wasn't for them there would of been times my kids would of gone hungry. Food Stamps are so little for four people. Thank you for all you do. --mom of 2

Arlington EATS has helped my family more than once. There always there to help out families even when the pantry is not open. Since Arlington EATS started no families have to worry about going hungry, they know EATS is always there to help out. ---Food recipient

Arlington Eats have helped my family by opening the doors to us receiving food. Also lunches during school vacations. I wasn't able to feed my kids all the time, but then I started to go to Eats and they gave my family so much that there where no worse. My children never went hungry because of Arlington Eats.. They always have a smile on there and is always happy to see you. This program is amazing for so many families including mine.. Thank you so much Arlington Eats for all you do for us.---mom of 2

Volunteer testimonials

The EATS program has helped a lot with at least 2 meals on the Weekends which stretches food stamps. It's also always a great place to volunteer. I have been volunteering with EATS for over a year. These people are fantastic . There is no stop to what EATS does to get healthy food to families with kids. Each person that comes is treated with respect and dignity. Food is not held back from anyone. There are always veggie versions of a meal provided. A great group of people to work for. EATS is one of the best family based programs going. Thank u for letting me have a chance to help with this great program. ---Food recipient and Weekly Volunteer

Teachers/Administrators

With the help of Arlington EATS and their coordinated efforts, we have healthy snacks and fresh produce available to all students, all day long. This has helped to create an atmosphere of acceptance and has removed the potential embarrassment factor associated with having to approach an adult and ask for food, or to sit in class where all the other kids are eating snack and 1-2 students aren't because they didn't have food at home. In addition, we have seen a significant decrease in behavioral issues - students are not acting out because they are hungry, and are more available for learning because they know that they will have access to food each and every day. ---Karen Donato, Thompson School Principal

I will never forgot a first grader that was in the middle of a tantrum and finally yelled out "I'm hungry!" I immediately went into my lunch bag and gave this student some food. No one can focus when they are hungry and unsure when their next meal might be. Arlington EATS has filled this gap and more. The snack program at Thompson allows any child to choose a piece of rescued fruit or other healthy snacks such as a granola bar or cheese stick. All students now have access to healthy snacks all day long, resulting in happier, focused learning. As co-leader of the Weekend Food Program, I love seeing my students and their families at the pop-up pantry on Fridays filling their bags for the weekend. -Nicole Melnik, teacher at Thompson School

Donors

We know it takes a village to keep a community going, and when everyone chips in great things can happen. We chose to donate to Arlington EATS because we share the belief that no child in Arlington should go hungry. These volunteers do a tremendous job helping the children of our community, and we are proud to support their hard work. - Steve McKenna & The Home Advantage Team

Our Kids, Our Community

Over 500 Arlington students receive free and reduced-price lunches during the school year. Arlington EATS feeds these students when school is out. During the 2014/15 school year, EATS served students through four programs:

Summer Vacation Lunch Program

- Provided 2,460 meals at the Thompson School over 7 weeks
- Provided funding for 2,900 meals at the Boys and Girls Club drop-in program

February/April Vacation Lunches

- Served 220 meals per week during school vacation, mostly provided by local stores, restaurants, caterers

Snack Program

- Distributed over 7,000 snacks at Thompson
- Helping to develop snack programs at all Arlington elementary schools

Weekend Food Bags

- Provided ingredients for 4440 meals
- Consistently served 80 families during the school year

*All four programs distribute fresh produce and rescued food from **Food for Free** in Cambridge and **Food Link** in Arlington; over the last year, we distributed **34,000 pounds, valued at over \$50,000***



Thanks to:

Arlington Food Pantry,
Arlington Interfaith Community,
Arlington Swifty Printing,
Beaujolais Catering,
Food For Free,
Food Link,
My Brothers Place,
Something Savory
Thompson Elementary,
Town of Arlington Food Services,
Whole Foods Arlington,

and to all the individuals who
continue to provide meals, donations,
and precious time...

Arlington EATS is a 501c3 org under the
Town of Arlington Health and Human
Services Charitable Organization. Your
donations are tax deductible.

Help set a place for every child

- For **\$8**, you can help feed a child for a **weekend**
- For **\$20**, you can help feed a child for a **school vacation week**
- For **\$50**, you can help provide a school with snacks for a **week**
- For **\$200**, you can help feed a child for **the summer**
- For **\$500**, you can sponsor a **Weekend Food Distribution**

Get involved

- Volunteer with your whole family! To sign up: arlington-eats.org
- Like us on Facebook: [facebook.com/Arlington.EATS](https://www.facebook.com/Arlington.EATS)
- Contact us: info@arlington-eats.org

Make a donation

- Online via PayPal at <http://bit.ly/YXBpzz>
- Check to Arlington EATS c/o Thompson School,
187 Everett Street, Arlington, MA 02474

Arlington-EATS.org

Feeding Children, Creating Community



Pictures of Arlington EATS in action!



CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title Co-chairs of Arlington EATS

Lauren Ledger (submitted electronically)

Susan Stewart (submitted electronically)

Name

Lauren Ledger

Susan Stewart

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Fidelity House

Address: 25 Medford Street, Arlington, MA 02474

Telephone No. 781-648-2005 **Fax No.** 781-648-4604

E-Mail: fidelityhouseordir@hotmail.com ; fidelityhouse@fidelityhouse.net

Project Title: Fidelity House Jobs, Jobs, Jobs

Amount of Funding Requested \$5,000

Project Description: The Jobs, Jobs, Jobs program is designed to help Fidelity House youth programs and high school age youth from low to moderate income families. We provide job training and experience working with younger youth while the program benefits from having additional supervision and energetic personnel working with our 3 – 14 year old clientele.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$4,000	2015-2016

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
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Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Teen age youth who are learning the necessary requirements, expectations & skills they need for future employment and to become better citizens. They all come from low to moderate income family backgrounds.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents. 66% or more are Arlington residents....any others are from local surrounding areas and have a current strong work, school or past Fidelity House Summer Camp connection.

Service Need

What need will be met by providing the proposed service to the community and the target population?

Providing jobs/work experience for teens during the summer.

What are the short-term goals and objectives for the contract period?

The goal is to train teens to arrive at work on time, learn professional work expectations and interact with their community.

Teach teens how to interact with youth ages 3 – 14 and learn how to provide a safe atmosphere, stimulate interest and guide younger kids to interact with each other.

How will the target population be reached?

Via printed information, mailings and local high school postings

How will client eligibility be documented?

They provide family income documentation with their written application

How will the project be managed and staffed?

Executive Director oversees financial data & School Age Child Care Program/Day Camp Program

Directors oversee training/supervision of teen.

What is the timetable for delivery of services?

Provided during teen out of school hours

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Funds to pay for teen jobs	5,000
Total Cost of the Activity/Project →	5,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Funds to pay for teen jobs	5,000
Total Amount of this Grant Request for FY 2012-2017→	5,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	5,000
Total Funding for the Activity/Project →	5,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title

Name

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Fidelity House

Address: 25 Medford Street, Arlington, MA 02474

Telephone No. 781-648-2005 **Fax No.** 781-648-4604

E-Mail: fidelityhouseordir@hotmail.com, fidelityhouse@fidelityhouse.net

Project Title: Menotomy Manor Outreach Program

Amount of Funding Requested \$16,000

Project Description: Our Menotomy Manor Outreach Program originated to directly address the developmental needs of Arlington's low income youth, offer opportunities, reduce the barriers that prevent participation (i.e. location and financial barriers) and help assimilate them into community wide programs. Menotomy Manor is the name of Arlington's low income housing development. The program includes free transportation to and from Fidelity House, free memberships for the youth, participation in and scholarships for our youth programs, on-site programming, Summer Camperships & free transportation to/from Fidelity House to attend our Summer Day Camp. It is a unique program in Arlington that is able to offer stability, long term benefits and has served well over a thousand children for a sustained period of time since its inception.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☐ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG funding	\$14,000	7/1/15- 6/30/16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
United Way	\$8,000	7/1/15-6/30/16

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Our client population is the youth, 5-18 years old, that reside in the low/moderate income housing development in Arlington. The adult population that benefit include the parents/legal guardians of those children.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

All clients are Arlington residents.

Service Need

What need will be met by providing the proposed service to the community and the target population?

The need to increase self-reliance and further the social, physical and emotional growth of the individual is universal. This program insures that more youth in our community have the same opportunities for growth, regardless of financial considerations.

What are the short-term goals and objectives for the contract period?

Our Menotomy Manor Outreach Program objectives are to increase both the opportunities and participation of youth that reside at Menotomy Manor, provide prevention/intervention programming that meets the needs of the youth and their families, decrease barriers to participation by providing transportation, be a stable and responsible presence in their developmental years and offer financial assistance year round.

How will the target population be reached?

- 1- Mailing to all residents of Menotomy Manor
- 2- Onsite meetings and program visibility
- 3- Information relayed through current clientele, tenant's association and local school liaisons.
- 4- A yearly onsite meeting

How will client eligibility be documented?

Parent/Guardians provide necessary information via membership forms, financial aid forms (including tax form or public assistance documentation). The Arlington Housing Authority provides financial guidelines that are required for tenants to be eligible to reside at Menotomy Manor.

How will the project be managed and staffed?

The Youth Program Director is responsible for overseeing the administrative, personnel and transportation needs of the Program. The Executive Director reviews all financial data. An adult Outreach Coordinator is responsible for handling the onsite daily requirements for the program with the assistance of college/high school staff.

What is the timetable for delivery of services?

Year round

Summer Camperships and transportation are provided June – August while Memberships, program financial assistance, transportation and onsite programming are offered September – June.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Youth Program Director	\$7,020
Outreach Program Director	\$3,578
Free Memberships and activity scholarships	\$6,726
Summer Day Camp Camperships	\$12,000
Transportation costs to/from Menotomy Manor to Fidelity House	\$3,744
Additional Onsite Youth Supervisors, summer transportation staff	\$1,092
Periodic Mailings	\$500
Supplies for school year onsite program	\$300
Administrative costs	\$3,015
Total Cost of the Activity/Project →	\$37,975

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Free Memberships, Day Care and Program scholarships	\$3,500
Summer Day Camp Scholarships	\$9,000
Transportation costs to/from Fidelity House for the Day Camp & school yr.	\$2,000
Onsite staffing and supplies	\$1,500
Total Amount of this Grant Request for FY 2015-2016 →	\$16,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 (for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$16,000
United Way	\$8,000
Fidelity House Fundraising (through Flower Sales, Golf Tournament	\$13,975
Annual silent/live auction evening	
Total Funding for the Activity/Project →	\$37,975

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title

Name

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Agency & Project Summary Information

Legal Name of Agency/Organization: Food Link, Inc.

Address: 32 Oldham Road Arlington, MA 02474

Telephone No. 781-819-4225

E-Mail: bpeats@foodlinkma.org

Project Title: Healthy Food Delivery to Arlington Housing Authority Locations

Amount of Funding Requested \$10,000

Project Description:

Food Link is an Arlington, Massachusetts-based food rescue organization that uses the power of volunteers to collect fresh food from food retailers and distribute it to local residents in need. Over 75 volunteers collect and distribute food seven days a week to alleviate hunger and support environmental sustainability. We partner with 12 local grocery and prepared food stores to utilize high-quality fresh fruit, vegetables, meat, dairy, bread and prepared foods that would otherwise be wasted. Food Link provides healthy food to over 25 social service agencies including after school programs, programs for at-risk youth, low income housing facilities, homeless shelters, food pantries, and senior centers throughout Arlington and surrounding towns. Food Link collects and distributes over 30,000 pounds of food each month of which the majority (about 75%) of the food benefits Arlington residents and programs.

Food Link regularly delivers food directly to four Arlington Housing Authority housing facilities, where low income families, elders, and people with disabilities live. Bringing the food to the facilities reduces many of the barriers to accessing nutritious food including the lack of time, lack of transportation, lack of mobility to carry food, and feelings of stigma associated with attending a program specifically for low cost food. The elderly and disabled in particular benefit from having fresh food delivered to them regularly.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☒ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☒ Elderly Individuals
- ☒ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
ACBG	\$1,250	July 1, 2015 - June 30, 2016

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
Anonymous Donor	\$10,000	Cargo van (Purchased Jan 2016)
Anonymous Donor	4,300	Cargo van (Purchased Jan 2016)
BNY Mellon	15,000	Cargo van (Purchased Jan 2016)
East Cambridge Savings Bank	1,000	Cargo van (Purchased Jan 2016)
Food Link Board of Directors	1,000	Cargo van (Purchased Jan 2016)
Jerry Rojo	1,000	Cargo van (Purchased Jan 2016)
Oakes Plimpton	450	Cargo van (Purchased Jan 2016)
Watertown Savings Bank	1,000	Cargo van (Purchased Jan 2016)
December Matching Campaign	12,000	General Operations (FY 2016)
Bowes Real Estate	2,500	General Operations (FY 2016)
The Lenny Zakim Fund	7,500	General Operations (FY 2016)
Arlington Food Pantry Delivery Fee	4,800	General Operations (FY 2016)

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Residents of four Arlington Housing Facilities will receive food from Food Link including those living at: Chestnut Manor, Cusack Terrace, Drake Village, and Menotomy Manor. The following demographic information is an estimate based on 2015 reports from the Arlington Housing Authority.

Number of seniors: 581

Number of low income families: 177

Number of White: 781

Number of Black/African American: 112

Number of Asian: 242

Number of American Indian/Alaskan: Native 9

Number of Hispanic: 93

Total: 1,144 (Please note that this is not a total of the above as this includes both race and ethnicity)

0-30% (very low) of Median Income 500

(Please note that 0 – 30% of AMI in Arlington is 0 - \$29,500. Because of how the Arlington Housing Authority collects demographic information, we are using a range of 0 - \$24,999)

31%-50% (low) of Median Income 147

(Please note that 31 – 50% of AMI in Arlington is \$29,500 – 49,250. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$25,000 – 44,999)

51%-80% (moderate) of Median Income 46

(Please note that 51 – 80% of AMI in Arlington is \$49,250 – 78,800. Because of how the Arlington Housing Authority collects demographic information, we are using a range of \$45,000 and above)

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Yes.

Service Need

What need will be met by providing the proposed service to the community and the target population?

Elders, low income families with children, and people with disabilities often struggle to get to the grocery store regularly. The cost of groceries, the cost of transportation to the store and the ability to carry heavy loads make it difficult for this population to get fresh food on a regular basis. As a result, this population often is not able to eat healthy food, negatively impacting their health.

Food Link brings healthy food to this population on a regular basis. Food Link provides fresh fruits and vegetables, dairy and bread one to four times each week to four housing facilities operated by the Arlington Housing Authority. This enables elders, low income families with children, and people with disabilities to have regular, convenient access to healthy foods at no cost.

What are the short-term goals and objectives for the contract period?

In 2016 Food Link will continue to deliver healthy food at no cost to these housing facilities. We will work with the residents and staff to determine the best ways to serve the residents. We will ensure that the types and amounts of food we are providing and the time and regularity with which we provide it is most helpful for the residents. Our goal is to provide a minimum of 5,000 pounds of a combination of fresh produce, dairy and bread each month (60,000 pounds per year).

How will the target population be reached?

We will continue to deliver food to the housing facilities. Anyone who resides in the facilities is welcomed to help themselves to food. We will work with staff to increase outreach so all residents are aware of these free food deliveries.

How will client eligibility be documented?

All residents of Arlington Housing Authorities will be eligible.

How will the project be managed and staffed?

Food Link is a volunteer-based organization that relies on over 75 volunteers to collect and distribute food throughout the area. Food Link is managed by two co-founders, an operations director (paid staff position) and a Board of Directors.

What is the timetable for delivery of services?

Food Link will deliver food to each location from one to four times per week. Chestnut Manor and Cusack Terrace will continue to receive at least one delivery per week; when Cusack Terrace has the use of its Community Room again, this will be increased to twice per week. Menotomy Manor and Drake Village each will continue to receive at least three deliveries each week. Food Link works with the staff and residents to determine the best timing for deliveries. Food Link will work with the Arlington Housing Authority to reinstate deliveries to Winslow Tower.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Operations Director (Base, Payroll taxes & Worker's Comp)	\$13,706
Van Expense (fuel, maintenance, insurance)	1,351
Technology costs for volunteer and food donation tracking	616
Mobile phone & Internet access	308
Liability Insurance	385
Volunteer Recruitment	297
Supplies	200
(This Activity / Project reflects 22% of all Food Link activities; 75% of Food Link's activities benefit Arlington residents & programs)	
(cost per pound \$16,863 / 60,000 = \$0.281 per pound)	
Total Cost of the Activity/Project -	\$16,863

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Operations Director (Base, Payroll taxes & Worker's Comp)	\$9,131
Van Expense (allocated portion)	669
Supplies	200
Total Amount of this Grant Request for FY 2016-2017 →	\$10,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$10,000
Lenny Zakim Fund Grant (22% of the \$7,500 grant)	1,650
December Donation Campaign (22% of \$12,000)	2,640
Project Bread Grant (22% of \$1,000)	440
Fundraising Activities	2,133
Total Funding for the Activity/Project →	\$16,863

Food Link, Inc.

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature  **Title** President, Food Link, Inc.

Name DeAnne Dupont

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Town of Arlington Recreation

Address: 422 Summer Street, Arlington, MA 02474

Telephone No. 781-316-3880

Fax No. 781-641-5495

E-Mail: jconnelly@town.arlington.ma.us

Project Title: I can Shine Learn to Bike Program

Amount of Funding Requested \$1,200

Project Description:

iCan Bike programs are for people with disabilities ages eight and up. The vast majority of people with disabilities never experience the thrill of independently riding a two-wheel bicycle during their lifetime. Research shows that over 80% of people with Autism and 90% of people with Down syndrome never learn to ride a two-wheel bicycle. Defying these odds is why I Can Shine exists!

Their adapted iCan Bike program resulted from more than twenty years of research by Dr. Richard E. Klein, a mechanical engineering professor, and his students at the University of Illinois at Urbana-Champaign. Dr. Klein retired from his academic career at the University of Illinois in 1998 and held the first bike camp in 1999 in LaCrosse, WI.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 51% of the residents are low or moderate income persons.

Please provide Census Tract number(s) _____, _____, _____ (Census Tract numbers can be found at the following website: **Factfinder.census.gov**)

XLow/Moderate Income Clientele: the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☒ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$1,200	7/1/15 -6/30/16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
--------	--------	----------------

NA

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

Participants are riders who are children 8 years and up, as well as teens and adults, who have a diagnosed disability but are able to walk without assistive devices.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Both Arlington residents and non-residents will be eligible to register for the program. Arlington residents will be given first priority.

Service Need

What need will be met by providing the proposed service to the community and the target population?

I Can Shine bike uses adapted bicycles, a specialized instructional program and trained staff to enable individuals with disabilities to learn to ride a two-wheel bicycle.

What are the short-term goals and objectives for the contract period?

Same as above.

How will the target population be reached?

Advertisement is done through the Arlington Public Schools and household mailing through the Recreation Department brochure.

How will client eligibility be documented?

The program information will be kept at the Arlington Recreation Department

How will the project be managed and staffed?

The program is coordinated and run with current Recreation Department administrative staff and community volunteers.

What is the timetable for delivery of services?

The program will be held during the summer of 2017.

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY2016-2017
Professional Services ICan Shine Staff	\$9,900
Facility Rental	\$2,750
T-shirts for staff and participants	\$900
Trophies for participants	\$100
Office Supplies	\$100
Total Cost of the Activity/Project →	\$13,750

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Professional Services ICan Shine Staff	\$9,900
Total Amount of this Grant Request for FY2016-2017 →	\$1,200

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$1,200
Fees	\$12,550
Total Funding for the Activity/Project →	\$13,750

CERTIFICATION

*I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION
IS TRUE AND ACCURATE.*

Signature

Joseph J. Connelly

Title

Director of Recreation

Name

Joseph J. Connelly

Federal ID#

046-001-070

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Town of Arlington Recreation

Address: 422 Summer Street, Arlington, MA 02474

Telephone No. 781-316-3880

Fax No. 781-641-5495

E-Mail: jconnelly@town.arlington.ma.us

Project Title: Scholarships

Amount of Funding Requested \$17,000

Project Description:

Scholarships for seasonal Arlington Recreation youth programs. Please note that Arlington Recreation did not submit its annual \$4,000 request for the Jobs program and instead is requesting an additional \$4,000 in scholarship funding.

There is a tremendous need in town for assistance with programming fees. The requests for scholarships continue to grow annually. Arlington Recreation received requests for over \$40,000 in program assistance in the first six months of FY 2016. The Arlington Recreation Department attempts to accommodate every request by providing at least a partial scholarship for each request. The additional funding would go a long way to assisting Arlington Recreation in being able to partially fund each resident's request.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 51% of the residents are low or moderate income persons.

Please provide Census Tract number(s) _____, _____, _____ (Census Tract numbers can be found at the following website: **Factfinder.census.gov**)

X **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- X Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$13,000	7/1/14 – 6/30/15

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
NA		

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The scholarship applicants must meet specific income guidelines set by the CDBG program.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Yes

What method was used to identify and assess the target population?

Advertisement is done through the Arlington Public Schools and household mailing through the Recreation Department brochure.

Service Need

What need will be met by providing the proposed service to the community and the target population?

These programs give to those who may not be able to afford recreational programs the opportunity to participate in the programs.

What are the short-term goals and objectives for the contract period?

To enable as many children as possible to participate in an Arlington Recreation programs.

How will the target population be reached?

Advertisement is done through the Arlington Public Schools and household mailing through the Recreation Department brochure.

How will client eligibility be documented?

The applications will be kept on file which will include a verification of income.

How will the project be managed and staffed?

The program is coordinated and run with current Recreation Department administrative staff.

What is the timetable for delivery of services?

The program year would begin in July 2016 and run through June 2017.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY2016-2017
Program Re-imbursements	\$17,000
Total Cost of the Activity/Project →	\$17,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Same as above	\$17,000
Total Amount of this Grant Request for FY2016-2017 →	\$17,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$17,000
Total Funding for the Activity/Project →	\$17,000

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Joseph J. Connelly

Title

Director of Recreation

Name

Joseph J. Connelly

Federal ID#

046-001-070

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Agency & Project Summary Information

Legal Name of Agency/Organization: Operation Success Learning Center

Address: 45 Fremont Court Menotomy Manor

Telephone No. : 781-710-5309 Fax No. _____

E-Mail: jmaguire924@hotmail.com

Project Title: Learning Center for Middle and High school students

Amount of Funding Requested \$ 6,000.00

Project Description:

Established in 1999 by Janet Maguire and Peggy Regan, Operation Success offers an academic program to approximately 30 children that reside in Menotomy Manor. There are 16 volunteers, teachers, retired teachers and Arlington residents who volunteer their time. The homework center is open four nights a week during the academic school year from 7:00-8:30 pm. Operation Success offers a structured and safe environment to learn. The focus is to help meet daily academic requirements at school, reinforce study skills, and improve organizational skills while building confidence, self-esteem, and good citizenship.

Children receive individual and small group tutoring. The goal is for every child to gain awareness of his or her strengths.

Operation Success offers a computer room (eight computers, four study rooms, and all supplies required to successfully complete assignments and projects.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☐ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☒ Individuals with Disabilities (**learning**)
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of *prior* year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$6,000	2014/2015

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
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Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

They are children and young adults ages 11-18- Low income residing in Menotomy Manor Housing Development.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

The population is Arlington based. All reside in Menotomy Manor.

Service Need

What need will be met by providing the proposed service to the community and the target population?

- ➔ **The first need met is to provide educational support to the children that they are active participants in their learning and education.**
- ➔ **Another need met is that are becoming engaging citizens of the Arlington community.**

What are the short-term goals and objectives for the contract period?

- ➔ **Students are actively participants in their learning.**
- ➔ **Students gain the skills that they are independent learners**
- ➔ **Students become active members of the Arlington community**

How will the target population be reached?

- ➔ **Arlington Housing documentation of children that reside in the manor that are enrolled in grades 6-12**
- ➔ **Flyer distribution to appropriate households**
- ➔ **Open House for parent/s and guardian/s**

How will client eligibility be documented?

- ➔ **Through Arlington Housing client households that reside in Menotomy Manor**

How will the project be managed and staffed?

- ➔ **There are 16 volunteers total. Every night there is also one leader present from 7:00-8:30**

What is the timetable for delivery of services?

- ➔ **Academic School year calendar**

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
16 volunteers	\$0.00
Backpacks given to each participant	\$700.00
Summer Reading Books/folders	\$500.00
Open House (flyers, handouts)	\$150.00
Girl's Night with speaker/s (food, set-up, materials)	\$200.00
Boy's Night with speaker/s (food, set-up, materials)	\$200.00

Misc. Expenses Supplies for center	\$500.00
Upkeep, Maintenance, and supplies for computers	\$2000.00
Supplies for center	\$2000.00
Total Cost of the Activity/Project →	\$7450.00

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Supplies for center	\$2100.00
Upkeep for computers, printers, replacement	\$2100.00
Boy's and Girl's Night	\$400.00
Summer Reading projects	\$500.00
Backpacks	\$700.00
Open House (supplies)	\$175.00
Total Amount of this Grant Request for FY 2016-2017 →	\$5975.00

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	5975..00

Total Funding for the Activity/Project →	\$6000.00

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature *Janet Maguire*

Title ***Operation Success Learning Center***
Menotomy Manor

Name *Janet Maguire*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington High School Athletics

Address: 869 Massachusetts Avenue, Arlington, MA 20474

Telephone No. 781-316-3551 **Fax No.** 781-316-3558

E-Mail: mdlugolecki@arlington.k12.ma.us

Project Title: Financial Aid Athletic Scholarships

Amount of Funding Requested \$ 13,000

Project Description: Arlington High School provides athletic scholarships for student-athletes whose families do not have the funds to pay the athletic user fee. As research shows, participation in high school athletics yields statistically higher graduation rate, a higher GPA and lower disciplinary issues. Arlington High School strives to provide a platform for success and involvement for all students, regardless of economic status. As the numbers of involvement in athletics has increased steadily over the course of the last few years, the number of athletic scholarships granted has increased as well. Scholarships are provided for those at either a free or reduced rate, depending on financial need.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following

groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- x ☐ Other (please specify)

Program Funding

Identify and list amount of *prior* year Federal and/or State funding

Source	CDBG Grant	Amount	\$8,000.00	Funding Period
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Identify *other* funding sources (non-federal/private)

Source	Amount	Funding Period
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None

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The client population served by this project includes student-athletes whose families qualify for reduced or free lunch and reduced or free athletic user fees. The business office evaluates all applicants' income and need before determining the amount of scholarship provided. The scholarships allow students to participate regardless of economic status.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

No. Due to the Metco program, some students that may qualify could live in outside of Arlington. However, all students attend Arlington High School. Less than 5% of our student-athletes have historically been Metco students.

Service Need

What need will be met by providing the proposed service to the community and the target population?

Student athletes will be afforded the ability to participate in athletics, providing them the benefits of structure after school, membership to a team and opportunities to learn life lessons including commitment, communication, time management, teamwork and sportsmanship.

What are the short-term goals and objectives for the contract period?

To foster an environment that affords opportunities for all of our students to become involved, develop life-skills and reap the benefits that research states are associated with interscholastic athletic programs- higher graduation rate, lower disciplinary issues and increased self-esteem/confidence.

How will the target population be reached?

All families of students interested in signing up for athletics will be notified of the scholarship opportunity and application process.

How will client eligibility be documented?

The business office collects, assesses and retains all applications that include W-2 forms and if applicable, the free and reduced lunch scholarship form at AHS.

How will the project be managed and staffed?

The athletic office and business office collaborate to manage and staff the program. No additional funds are used for staffing purposes.

What is the timetable for delivery of services?

Seasonal- fall, winter and spring athletic seasons.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2015-2016
Athletic Scholarships	\$13,000.00
Total Cost of the Activity/Project →	\$13,000.00

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2015-2016	Amount

Total Amount of this Grant Request for FY 2015-2016 →	\$13,000.00

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2015-2016 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$13,000.00
Total Funding for the Activity/Project →	\$13,000.00

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Title

Name

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Town of Arlington Recreation

Address: 422 Summer Street, Arlington, MA 02474

Telephone No. 781-316-3880

Fax No. 781-641-5495

E-Mail: jconnelly@town.arlington.ma.us

Project Title: ADA Accessibility Upgrades at the Thorndike Park

Amount of Funding Requested \$25,000

Project Description:

The Town of Arlington and the Parks and Recreation Commission completed an ADA self assessment of all properties under the Park Commission jurisdiction. The Commission is currently prioritizing the recommendations. The total estimated cost of the upgrades is \$1,346,035. Some upgrades will be completed within the yearly approved capital improvement/CPA projects. The requested amount would enable us to upgrade smaller projects not currently in the capital plan.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 51% of the residents are low or moderate income persons.

Please provide Census Tract number(s) _____, _____, _____ (Census Tract numbers can be found at the following website: **Factfinder.census.gov**)

X Low/Moderate Income Clientele: the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☐ Elderly Individuals
- X Individuals with Disabilities
- X Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
Capital Program	\$50,000	7/1/15 – 6/30/16

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The entire Arlington Community will be served by completing this project.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Both Arlington residents and non-residents will benefit.

Service Need

What need will be met by providing the proposed service to the community and the target population?

The facility will become accessible to all residents and non-residents that would like to enjoy the park.

What are the short-term goals and objectives for the contract period?

To have the facility be accessible to all.

How will the target population be reached?

N/A

How will client eligibility be documented?

The facilities will meet ADA requirements.

How will the project be managed and staffed?

The program is coordinated and run with current Recreation Department administrative staff.

What is the timetable for delivery of services?

Design would begin in the fall of 2016 with anticipated construction beginning in the spring of 2017.

TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY2016-2017
ADA required upgrades at the Thorndike Park	\$25,000
Total Cost of the Activity/Project →	\$25,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Same as above	\$25,000
Total Amount of this Grant Request for FY2016-2017 →	\$25,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$25,000
Total Funding for the Activity/Project →	\$25,000

Signature

Joseph J. Connelly

Title

Director of Recreation

Name

Joseph J. Connelly

Federal ID#

046-001-070

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Commission on Disability

Address: 20 Academy St., Arlington Ma 02476

Telephone No.: 781-316-3431 **Fax No.** 781-641-2103

E-Mail: jjones@town.arlington.ma.us

Project Title: Curb Cut Ramp Project

Amount of Funding Requested \$150,000.00

Project Description:

Funding from this project will be used for construction of curb cut ramps. These ramps will improve access and pedestrian safety for the elderly and disabled. If fully funded this project would result in the installation of approximately fifty curb cut ramps.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☒ Elderly Individuals
- ☒ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$125,000.00	07/01/15-06/30/15

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
N/A		

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The target population is elderly and disabled individuals

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

This project will mainly be of benefit to Arlington residents; however this project will benefit all individuals using Arlington sidewalks.

Service Need

What needs will be met by providing the proposed service to the community and the target population?

This project will improve pedestrian safety by eliminating a physical barrier that is encountered by elderly, disabled, parents pushing carriages, and other individuals.

What are the short-term goals and objectives for the contract period?

The goals for this contract period are to eliminate physical barriers that exist because of non-existing curb cut ramps and existing curb cut ramps that do not comply with ADA code requirements. Eliminating these physical barriers will improve accessibility and safety along Arlington sidewalks.

How will the target population be reached?

The target population of mobility-impaired residents will be served by the construction of curb cut ramps that will remove the physical barrier of curbing between the street and sidewalks.

How will client eligibility be documented?

N/A

How will the project be managed and staffed?

The Arlington Engineering Department along with the Commission on Disability Office will ensure that all curb cut ramps constructed or reconstructed meet ADA Code requirements.

What is the timetable for delivery of services?

The timetable for delivery of services is from July 1, 2016 through June 30, 2017.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Installation of approximately 50 curb cut ramps, by a private contractor	\$150,000.00
Total Cost of the Activity/Project →	\$150,000.00

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Installation of approximately 50 curb cut ramps.	\$150,000.00
Total Amount of this Grant Request for FY 2016-2017 →	\$150,000.00

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 (for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$150,000.00
C.D.B G. is the only source of income to find this project.	
Total Funding for the Activity/Project →	\$150,000.00

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature



Title:

Director of Housing & Disability Programs

Name

John Jones

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization:

Town of Arlington Housing & Disability Program Office

Address:

20 Academy St., Arlington, Ma. 02476

Telephone No. Fax No.

781-316-3431 781-641-2103

E-Mail:

jjones@town.arlington.ma.us

Project Title:

Arlington Home Rehabilitation Loan Program

Amount of Funding Requested

\$325,000.00

Project Description:

Funding for the Arlington Home Rehabilitation Loan Program (AHRLP) will improve and upgrade the living conditions for low and moderate-income homeowners of 1-4 family structures by providing financial assistance in the form of low interest and deferred loans. Loans will enable homeowners to make necessary home repairs and to correct violations of existing building code standards that could be detrimental to the health and safety of the occupants. The AHRLP staff will prepare a detailed list of all repairs to be done, obtain cost estimates and evaluate these estimates with the homeowner. The AHRLP inspects work in process and upon completion to ensure that all work has been performed in accordance with work specifications. Funding for the AHRLP will make housing more affordable for existing Arlington homeowners many of who are long-term residents of the Town.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☒ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☒ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☒ Elderly Individuals
- ☒ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of *prior* year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$ 225,000.00	07/01/15 – 06/30/16

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
--------	--------	----------------

N/A

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The target population is low and low-moderate income Arlington homeowners of 1-4 family structures.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

All recipients of services will be Arlington residents.

Service Need

What need will be met by providing the proposed service to the community and the target population?

The proposed service will improve and upgrade the living conditions of the target population by enabling this population to make necessary home repairs.

What are the short-term goals and objectives for the contract period?

The FY 2017 goals will be to provide low interest loans for home improvements that will improve the living condition for approximately twenty Arlington Households.

How will the target population be reached?

The target population will be reached by press releases in the Arlington Advocate, mailings, and by contacting local social service and elderly programs.

How will client eligibility be documented?

Income documentation will be included in the applicant's file that accounts for each member of an applicants household. Income documentation represents at least the most recent ninety days of income preceding the date of application.

How will the project be managed and staffed?

The project will be staffed with a Housing Specialist and an Intake/Outreach worker. These positions are shared with other Town programs.

What is the timetable for delivery of services?

The timetable for delivery of services is from July 1, 2016 through June 30, 2017.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Program Support Costs	\$80,975
Total Cost of the Activity/Project →	\$80,975

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Wages & Travel	
Gail Waitkunas $\$65,075 \times 50\% =$ \$32,538	
Mike DiNicola $\$75,537 \times 50\% =$ \$37,769	
Health Ins.	
Gail Waitkunas $\$ 6,294 \times 50\% =$ \$ 3,147	
Mike DiNicola $\$15,042 \times 50\% =$ \$ 7,521	
Total Amount of this Grant Request for FY 2016-2017 →	\$80,975

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 (for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$325,000
Total Funding for the Activity/Project →	\$325,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

John Jones

Title

Director of Housing & Disability Programs

Name

Jack Jones

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2015-2016**

Agency & Project Summary Information

Legal Name of Agency/Organization:

Town of Arlington Department of Planning and Community Development

Address: 730 Mass. Ave., Arlington

Telephone No.: 781 316-3091 **Fax No.:** 781 316-3112

E-Mail: lwiener@town.arlington.ma.us

Project Title: Affordable Housing

Amount of Funding Requested: \$527,121

Project Description: The Housing Corporation of Arlington seeks funding for 2 projects. The first project is located at 117 Broadway, the former Broadway Diner. This building now accommodates the Food Pantry. They seek \$350,000 for predevelopment costs, including developing plans and specs for this property. They anticipate this site will be redeveloped and will be a mixed use structure with commercial on the first floor, including the Food Pantry and another commercial use, and residential use above. It is anticipated that 12-20 affordable units can be developed. HCA is also anticipating doing some major capital improvements to its existing stock of affordable housing, including energy efficiency improvements, and exterior repairs such as roof and porch repairs.

\$350,000	117 Broadway mixed use, design and other pre-development costs
\$150,000	Capital improvements in existing affordable housing
12,121	Director of Housing, including monitoring existing projects
<u>15,000</u>	Legal and other outside services related to Affordable Housing
\$527,121	

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☐ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the

Bureau of Census' Current Population Reports definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

XX Low/Moderate Housing: The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

XX Homeless Individuals

☐ At-Risk Children & Youth

☐ Elderly Individuals

☐ Individuals with Disabilities

☐ Low and Moderate Income Area

XX Other (please specify) Low and Moderate Income Households

Program Funding \$527, 121

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$480,000	2015
HOME	\$950,000	2014
Mass. Historic	\$100,000	2015

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
TD Bank (Kimball-Farmer)	\$570,000	Acquisition and construction
Brookline Bank (Westminster)	\$650,000	Acquisition
Leader Bank (Kimball-Farmer)	310,000	30 years
Federal Home Loan Bank (K-F)	100,000	30 years
CharlesBank Homes Foundation	50,000	30 years

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

By the end of the current fiscal year the Kimball Farmer House (1173 Mass. Ave.) will be completed and occupied by 3 low income households, at or below 60% of median income. The property will have two 1-bedroom units and one 2-bedroom unit. The Westminster property is anticipated to receive permits and begin construction during FY2017. The 117 Broadway property will begin design this year. Lastly, the capital improvements planned for the scattered site portfolio will be completed including masonry work, roof replacements, boiler and hot water heater replacements, porch repairs or replacements and others. There will likely be 10-12 units improved with this funding. The income limit for all HCA properties is 60% of median income.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Arlington residents are given preference for 70% of the units. It is State policy to require that 30% of units be open to non-residents, in keeping with fair housing practices.

Service Need

What need will be met by providing the proposed service to the community and the target population?

According to the most recent census, over 2000 renter households in Arlington are both low and moderate income AND pay more than 30% of their income for rent. These are considered by HUD to be "cost burdened" households, and the most at risk for homelessness. The affordable housing created with the help of CDBG serves this population. In addition, both HCA and the Housing Authority report very long wait lists for their affordable housing.

What are the short-term goals and objectives for the contract period?

Three new affordable units completed (Kimball-Farmer), nine units under construction (26 Westminster), and 12-20 in planning (117 Broadway). In addition, 10-12 existing units will be upgraded with energy related and other capital improvements.

How will the target population be reached?

The State requires that all affordable housing be affirmatively marketed in order to be counted on the Subsidized Housing Inventory. This is to ensure that units are marketed to a diverse population. HCA will develop an affirmative and fair housing marketing and selection plan for any new projects. Tenants will be selected by lottery.

How will client eligibility be documented?

All tenant incomes are recertified annually, in keeping with requirements of federal and state funding.

How will the project be managed and staffed?

The Director of Housing works closely with the Housing Corporation of Arlington. After completion, the Director of Housing monitors compliance with all regulations annually. That includes both physical property inspections and income compliance.

What is the timetable for delivery of services?

Kimball Farmer House will be occupied by the end of the fiscal year. Westminster will be under construction, and 117 Broadway will be in planning and design. The proposed capital improvements will be complete.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2015-2016
Director of Housing, including Monitoring affordable housing	\$12,121
Legal and other services	\$15,000
Affordable housing development	\$350,000
Capital improvements, 2 family houses	\$150,000
Total Cost of the Activity/Project →	\$527,121

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2015-2016	Amount
All of the above	
Total Amount of this Grant Request for FY 2015-2016 →	\$527,121

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2015-2016 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$527,121
HOME Admin	\$8000
HOME project funding	\$950,000
Bank funding	\$800,000
Donations	\$50,000
Total Funding for the Activity/Project →	\$2,335,121

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature *Laura Wiener* **Title** *Acting Dir. of Planning*

Name *Laura Wiener*

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Vision 2020

Address: Town of Arlington, Dept. of Planning and Community Development

Telephone No. 781-316-3093 Fax No. 781-316-3112

E-Mail: juli@brazile.net jglushko@town.arlington.ma.us

Project Title: Community Volunteers in Support of Community Initiatives

Amount of Funding Requested \$ 3,000

Project Description: The Vision 2020 Standing Committee and its nine Task Groups have, since the 1990s, worked collaboratively with Town leadership to formulate and implement long-range planning for Arlington's future. Goals adopted by Arlington's Town Meeting and goals listed in the Master Plan guide the work of Vision 2020 volunteers as they engage with residents and town leadership to address topics of special concern to the community.

A key tool used by Vision 2020 is an annual insert to the Town Census mailing. Either an informational piece or a survey is mailed to every household along with the Town Census, making it possible for every resident to express their opinion or receive updates about important Town issues. This opportunity to educate the community and provide feedback from residents to town leaders contributes to civic engagement. Early regular financial support via the CDBG program made these surveys and other community activities possible; the community survey has been seen as an annual "event" in which town departments and organizations hope to participate. Occasionally residents propose inclusion of topics about which they are particularly concerned.

Survey results help identify important issues and guide the Board of Selectmen, Town Manager, Town and School departments as well as other departments and committees in developing policy. Early planning for the 2017 project has begun and possible topics have been proposed. The funding will enable the annual mailings to continue.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☐ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☐ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☐ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

☒ The project contributes to the planning, policy-management and capacity building for the community as described in detail under Title 24: Part 570 subpart C, Section 205.

Primary Beneficiary of Project

- ☐ Homeless Individuals
- ☐ At-Risk Children & Youth
- ☐ Elderly Individuals
- ☐ Individuals with Disabilities
- ☐ Low and Moderate Income Area
- ☒ Other (please specify) Planning and resident participation activities

Program Funding

Identify and list amount of *prior* year Federal and/or State funding

Source	Amount	Funding Period
CDBG Funds	\$3000	Fiscal Year 2015-2016

Identify *other* funding sources (non-federal/private)

Source	Amount	Funding Period
--------	--------	----------------

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

The entire Town is the survey population, the recipient of findings from the survey, and the beneficiary of any changes made because of survey recommendations

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

Yes, all clients will be residents of Arlington.

Service Need

What need will be met by providing the proposed service to the community and the target population?

1. Provides Community access to governance and long range planning in Arlington
2. Broadens communication to and within the Community, creating compromise *where* needed, and consensus to move forward.
3. Educates residents about topics addressed in the survey so they will be informed about community issues and will understand why their experiences and opinions are important in shaping Arlington's future.
4. Advances Town Meeting approved goals for the Community as voted in 1992-93.
5. Encourages a wider cross-section of residents to engage in innovative thinking and problem solving, outside of the traditional boundaries of public forums and discussions.

What are the short-term goals and objectives for the contract period?

The Vision 2020 goal is to monitor community hopes and concerns, to focus on the selected key issues which arise, and encourage broad resident participation in developing strategies to respond to the issues identified.

The objectives:

The objective of the 2017 mailing is to solicit community groups and leaders for topics; present a fact-based short overview of the topic; formulate survey questions to elicit the extent of concern/support of the topic; review strategies for resolving/addressing the topic(s); develop a survey for public response, and collate the responses; produce a summary report for Town leadership and the community, reflecting the community response(s) on the topic; present primary findings at Town Meeting and other venues, publish them in The Arlington Advocate and on the Town website.

How will the target population be reached?

A paper document is printed and mailed with the Town's Annual Census to solicit resident input to Town questions or communicate information about issues we face as a community. Data from the survey are analyzed, reported and distributed widely and published in the Town's Annual Report and in the Arlington Advocate. Copies are held in the Robbins Library; an electronic copy is posted on the Town Website. Presentations are made to Town Meeting and other Town groups.

How will client eligibility be documented?

The survey is distributed to every household in the community as determined by the Town Clerk; approximately 19,317 households in 2016.

How will the project be managed and staffed?

The project is supported entirely by volunteers led by the Vision 2020 Standing Committee. Every year volunteers donate approximately 500 hours of time covering survey development through the final report. Based on Independent Sector's estimated 2013 average national volunteer time hourly rate of \$22.55, the \$11,275 "matching funds" value of Vision 2020 volunteer support exceeds the amount of funding requested. A local business prints the survey. Requested funds will cover the cost of printing the survey and the final report.

What is the timetable for delivery of services?

Topics for 2017 will be developed over the summer, questions refined in October and November, printing in December, and the 2017 Survey will be mailed in early January 2017 along with the Town's Census. Returns received by March 17, 2017 will be summarized for Town Meeting in late April and a final report that may include late responses will be prepared by June and posted on the Town website.

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project <i>(Detail ALL Staff positions, support costs, and other expense items associated with the activity/project.)</i>	Anticipated Costs for FY 2016-2017
Printing costs estimated based on previous year	\$ 2,500
Copying costs for Town Meeting Summary Report	\$500
Total Cost of the Activity/Project →	\$3,000

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
As above	\$3,000
Total Amount of this Grant Request for FY 2016-2017 →	\$3,000


c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$3,000
Total Funding for the Activity/Project →	\$3,000

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature



Title Chair, Vision 2020 Standing Committee

Name Juli Brazile



TOWN OF ARLINGTON
MASSACHUSETTS 02476
781 - 316 - 3090

**DEPARTMENT OF PLANNING and
COMMUNITY DEVELOPMENT**

MEMO TO: Adam Chapdelaine, Town Manager
Board of Selectmen
FROM: Laura Wiener, Acting Director of Planning and Community Development
DATE: February 12, 2017
SUBJECT: CDBG Program Year 42 – Request for Funds, Planning and Admin.

LW

On behalf of the Department of Planning and Community Development, I submit to you the following requests for Community Development Block Grant (CDBG) funds for the program year July 1, 2016 through June 30, 2017 for Planning and Admin. This category can use up to 20% of the grant amount plus program income each year.

Planning

Planners – This is a request for **\$45,000** to fund a portion of the salary and fringe benefits of the Planner and Assistant Director/Housing Director planning work. Duties and responsibilities involve data gathering, comprehensive planning, affordable housing planning and zoning and design studies.

Planning & Zoning Studies – This is to request **\$75,000** for costs related to implementation of the Master Plan, including but not limited to hiring a consultant to begin the process of revising the zoning bylaw (aka Recodification), and public outreach related thereto.

Cultural Plan--The Arlington Commission on Arts and Culture, working with the Town of Arlington Economic Development Planner, is seeking to create a cultural plan to focus efforts on maintaining and growing arts programming and arts and culture organizations in Arlington. The Arlington Cultural Commission's bylaws charge it with recommending a long term cultural plan for the Town. Without a solid cultural plan, the Town may put at risk its rich artistic, cultural, and historic heritage. It seeks **\$15,000** for this effort.

Administration

Grants Administrator – This is a request for **\$65,000** to fund the salary and fringe benefits of the Grants Administrator position. This staff person is responsible for the daily financial administration of the CDBG program, coordination of grant activities with program directors, monitoring funding activities, maintaining records and completing the reporting requirements of the CDBG program as required by HUD. In 2016 this position was funded at \$87,000. In 2017 it is anticipated that some funding will come from the CPA funds for this position.

General Administration – This is a request for **\$15,000** for administrative costs related to legal advertising, membership and training from National Community Development Association (NCDA), office expenses, and the Town's share of North Suburban HOME Consortium related professional service fees. We will also need to provide some training for a new Grants Administrator this year.

Total Request, Planning and Admin.: \$215,000

ARLINGTON CDBG PROGRAM: FUNDING REQUESTS FOR FISCAL 2016-17

draft 2.16.2016

CDBG Program Area:		FY2017 Request	FY2016 Request	FY2016 Allocation
PUBLIC SERVICES				
1	Boys & Girls Club Scholarships	\$20,000	\$20,000	\$14,500
2	Arlington Youth Consultation Center	\$20,000	\$25,000	\$10,122
3	Council on Aging: Adult Day Health Center Scholarships	\$10,000	\$10,000	\$4,000
4	Council on Aging: Transportation Program	\$65,059	\$73,999	\$40,000
5	Council on Aging: Volunteer Services Coordinator	\$56,253	\$53,530	\$53,530
6	Arlington EATS / Thompson School	\$6,000	\$6,000	\$1,250
7	Jobs, Jobs, Jobs Program (AB&GC/FH)	\$10,000	\$14,000	\$12,000
8	Menotomy Manor Outreach Program - Fidelity House	\$16,000	\$18,000	\$14,000
9	Foodlink Inc. Healthy Meals Program	\$10,000	\$17,500	\$1,250
10	Rec. Dept: Ican Shine Learn to Bike Program	\$1,200	\$2,000	\$1,200
11	Rec. Dept: Program Scholarships	\$17,000	\$13,000	\$13,000
12	Menotomy Manor/O.S. Homework Support Program	\$6,000	\$6,000	\$6,000
13	School Dept: AHS Athletic Scholarships	\$13,000	<u>\$13,000</u>	<u>\$8,000</u>
	Sub-total (Statutory limit: \$172,500)	\$250,512	\$272,029	\$178,852
PUBLIC FACILITIES AND IMPROVEMENTS				
14	ADA Park Compliance Program- (Thorndike Playground)	\$25,000	\$23,170	\$14,000
15	ADA Compliance Program- Curb Cuts	\$150,000	<u>\$150,000</u>	<u>\$125,000</u>
	Sub-total	\$175,000	\$173,170	\$139,000
REHABILITATION/HOUSING				
16	Affordable Housing Program	\$527,121	\$525,000	\$338,536
17	Arlington Home Improvement Loan Program	\$325,000	<u>\$350,000</u>	<u>\$225,000</u>
	Sub-total	\$852,121	\$875,000	\$563,536
PLANNING				
18	Vision 2020 support - Vision 2020 Committee	\$3,000	\$3,000	\$3,000
19	Master Plan Zoning & Planning Studies - Planning Dept.	\$75,000	\$75,000	\$50,000
20	Planner - Planning Dept.	\$22,500	\$20,000	\$20,000
21	Director of Housing - Planning Dept.	\$22,500	\$20,000	\$20,000
22	ACAC Cultural Plan - Planning Dept.	\$15,000	<u>\$0</u>	<u>\$0</u>
23	Sub-total	\$138,000	\$118,000	\$93,000
ADMINISTRATION				
24	Grants Administrator (salary + benefits) - Planning Dept.	\$65,000	\$86,960	\$86,960
25	General Administration - Planning Dept.	\$15,000	<u>\$20,000</u>	<u>\$12,000</u>
	Sub-total	\$80,000	\$106,960	\$98,960
	Planning & Admin. Sub-total (Statutory limit: \$230,000)	\$218,000	(\$215,000 from Planning Department, \$3,000 from Vision 2020)	
GRAND TOTAL of REQUESTS		\$1,495,633	\$1,545,159	\$1,073,348

Estimated CDBG grant, Fiscal 2016-17	\$1,000,000
Estimated CDBG program income, Fiscal 2016-17	\$150,000
Re-programmed CDBG funds from prior years	\$0
Total Estimated CDBG funds available, Fiscal 2016-17	\$1,150,000
Public Services limit (15% of Total Estimated funds)	\$172,500
Planning & Admin. limit (20% of Total Estimated funds)	\$230,000



Arlington
HOUSING AUTHORITY
MASSACHUSETTS

RECEIVED
SELECTMEN'S OFFICE
ARLINGTON, MA. 02174
FEB 22 10 53 AM '16

Commissioners:

Richard B. Murray
Nicholas C. Mitropoulos
Daniel F. Brosnan
Gaar Talanian
Joseph S. Daly

Executive Director

John J. Griffin

Tel.: (781) 646-3400

Fax: (781) 643-6923

February 18, 2016

Arlington Board of Selectmen
Mr. Steven M. Byrne, Chairman
730 Massachusetts Avenue
Arlington, MA 02476-4908

RE: Community Development Block Grant (CDBG) Funding Request for Program Year 2016-2017

Dear Chairman Byrne and Members of the Arlington Board of Selectmen:

The Arlington Housing Authority requests your consideration for funding the following grant request in the amount of \$350,000. This request will leverage \$ 2,919,965. From DHCD's HILAPP Program and allow us to build the new Life and Skills Building in Menotomy Manor and complete over two million dollars' worth of preservation work at Drake Village.

Please see the attached letter from DHCD dated February 18, 2016.

The attached pages will provide you with details of the request and the reasons why we feel that they are important and worthy for consideration.

Should you have any further questions regarding these requests, please feel free to contact me at 781-646-3400 x 16.

Sincerely,

John J. Griffin
Executive Director



Commonwealth of Massachusetts
**DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT**

Charles D. Baker, Governor ♦ Karyn E. Polito, Lt. Governor

February 18, 2016

John Griffin, Executive Director
Arlington Housing Authority
4 Winslow St.
Arlington, MA 02474-3062

RE: HILAPP Commitment for Drake Village (667-01) and Menotomy Manor (200-01)

Dear Mr. Griffin:

DHCD is issuing this letter as evidence of our continued commitment to making Drake Village and the Hauser Building a service-enriched, accessible senior campus and to building a new Life & Skills Center at Menotomy Manor.

On October 31, 2014, DHCD issued an award of \$1,833,333 to the Arlington Housing Authority (AHA) under the High Leverage Asset Preservation Program (HILAPP) with the understanding that the AHA would contribute a minimum of \$550,000 in Local CDBG funds to complete the following scopes of work:

Development	Hauser Building (667-01)
Scope of Work	Selected kitchens and baths, windows, ADA improvements, FOB, electrical upgrades, and replacement of smoke detectors
Original Estimated TDC:	\$1,483,333
Current Estimated TDC:	\$2,062,455
Increase in TDC:	\$579,122

Development	Menotomy Manor (200-1)
Scope of Work	Construction of Life & Skills Center
Original Estimated TDC:	\$900,000 (with \$550,000 to be paid for by Local CDBG funds)
Current Estimated TDC:	\$1,733,500
Increase in TDC:	\$833,500

Since that time, the AHA has worked with Elton + Hampton Architects to develop a set of schematic design drawings. As of now, the estimated TDC for both projects has grown from \$2,383,333 to \$3,795,955, which is equivalent to a total increase of \$1,412,622.

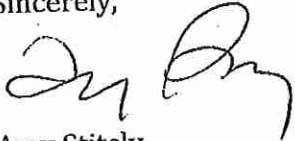
DHCD recognizes that both the total development costs and the leverage commitments may change as the projects move forward and is, therefore, willing to increase its HILAPP commitment to equal a maximum of \$1 for every 30 cents of leveraged funds. In other words, the AHA must leverage about 23% of the TDC in order for DHCD to increase its HILAPP award to cover all remaining costs.

If Elton + Hampton's current estimates are correct, then the AHA will need to secure leverage funds totaling at least **\$875,990** in order for DHCD to increase its HILAPP commitment to cover the full TDC of both projects.

As stated in the original award letter, DHCD will only approve advertising these projects to bid after the AHA provides proof of all leverage commitments. If AHA cannot secure leverage funds in the amount needed to warrant a sufficient increase in the HILAPP award to cover the full costs of both projects, then the AHA may use its Formula Funding or another source of funds to cover any budget gaps. Alternatively, the AHA may choose to reduce the scope of one or both projects.

Thank you for your continuing efforts to leverage funds to preserve public housing. If you have questions about this award please contact Amy Stitely, Director of the Bureau of Housing Development and Construction, at 617-573-1156.

Sincerely,



Amy Stitely
Director, Bureau of Housing Development and Construction

**TOWN OF ARLINGTON
COMMUNITY DEVELOPMENT BLOCK GRANT
FUNDING APPLICATION
FISCAL YEAR 2016-2017**

Agency & Project Summary Information

Legal Name of Agency/Organization: Arlington Housing Authority

Address: 4 Winslow Street, Arlington, MA

Telephone No. 781 6463400 ext 16 **Fax No.** ____781 643-6923

E-Mail: jgriffin@arlingtonhousing.org

Project Title: Menotomy Manor Life and Skills Building and Drake Village

Amount of Funding Requested \$350,000.00

This request will leverage \$ 2,919,965. in funding from the Department of Housing and Community Development's, (DHCD) High Leverage Asset Preservation Program (HILAPP) for both the Life and Skills Center as well as provide some ADA improvements, some new windows and other modernization at the Arlington Housing Authority first Development, Drake Village. It is a continuation of the successful grant request of 2013-2015 that resulted in \$550,000.00 awarded by the Arlington Board of Selectman from CDBG toward the construction of a Life and Skills Center to be located at Menotomy Manor and the Modernization of the Hauser Building at Drake Village.

The HILAPP Award for \$2,919,965.00 from DHCD is contingent on receiving our request of CDBG funding. *See enclosed letter from DHCD dated February 18, 2016.

The Arlington Housing Authority's HILAPP Program Application and Study for the accessibility and program improvements at Drake Village has been ongoing for the past three years and included for your reference are letters of support for our HILAPP Application from local and state funding sources.

Operation Success, The Arlington Boys and Girls Club, Fidelity House and the St. Vincent DePaul Society have been operating in two separate three bedroom units in Menotomy Manor for many years. Program participation continues to increase every year and all programs are targeted at low income, and the extremely low income families that we serve. The Life and Skills Center would offer larger and more efficient space for all of the programs above as well as allowing for additional programs such as banking and finance classes, computer training classes, job finding skills and counseling, all with the goal of making these families self-sufficient.

One of the key aspects of the Life and Skills Center proposal would allow us to use the two three-bedroom units for housing low income families.

Project Eligibility

This project/activity must meet **ONE** of the HUD National Objectives listed below. Please check applicable box.

☒ **Low/Moderate Income Area Benefit:** the project/activity meets the needs of persons residing in an area where at least 33.33% of the residents are low or moderate income persons.

☒ **Low/Moderate Income Clientele:** the activity benefits a group of persons (rather than residents in a particular area) 51% of whom are low or moderate income persons. The following groups are presumed to be Low/Moderate: abused children, battered spouses, elderly persons, adults meeting the **Bureau of Census' Current Population Reports** definition of "severely disabled", homeless persons, illiterate adults and persons living with AIDS.

☒ **Low/Moderate Housing:** The project will provide or improve permanent residential structures which, upon completion, will be occupied by low and moderate income households. This includes but is not limited to acquisition or rehabilitation. Housing can be either owner or renter occupied units in one family or multi-family structures.

☐ **Slum or Blighted Area:** the project is in a designated slum/blighted area as defined under State or local law and will address conditions that qualified the area as slum or blighted.

☐ **Spot Blight:** the project will prevent or eliminate specific conditions of blight or physical decay outside a slum area. Activities are limited to clearance, historic preservation, rehabilitation of buildings, but only to the extent necessary to eliminate conditions detrimental to public health and safety.

Primary Beneficiary of Project

- ☒ Homeless Individuals
- ☒ At-Risk Children & Youth
- ☒ Elderly Individuals
- ☒ Individuals with Disabilities
- ☒ Low and Moderate Income Area
- ☐ Other (please specify)

Program Funding

Identify and list amount of prior year Federal and/or State funding

Source	Amount	Funding Period
CDBG	\$ 150,000.00	2013
CDBG	\$ 200,000.00	2014
CDBG	\$ 200,000.00	2015
DHCD (HILAPP)	\$1,833,333.00	2015

Identify other funding sources (non-federal/private)

Source	Amount	Funding Period
--------	--------	----------------

Target Population

What are the characteristics of the client population to be served by this project? (Where applicable, please include total population (by age), number of families, income data such as median income, and other pertinent data, which applies specifically to the client.)

*Please see attached Tenant Statistical Summary Report for: Menotomy Manor.

*Please see attached Tenant Statistical Summary Report for: Chapter 667 Elderly/Disabled Housing.

Will all clients be residents of Arlington? If no, please provide percentage of non-Arlington residents.

YES

Service Need

What need will be met by providing the proposed service to the community and the target population?

The Life and Skills Center would provide employment and life skills to our low income families along with allowing the active, Operation Success, Fidelity House, the Arlington Boys and girls Club and other programs to grow and help our families become self-sufficient.

What are the short-term goals and objectives for the contract period?
To begin bidding and construction.

How will the target population be reached?
Mail, Flyers, Meetings, Notices

How will client eligibility be documented?
Eligibility will be verified by annual recertification.

How will the project be managed and staffed?
Arlington Housing Authority Staff, The Arlington Police, and outside programs.

What is the timetable for delivery of services?
Fiscal Year -2017

1. Budget Information:

a) Total Costs for the Proposed Activity/Project:

All Cost Items for the Activity/Project (Detail <u>ALL</u> Staff positions, support costs, and other expense items associated with the activity/project.)	Anticipated Costs for FY 2016-2017
Menotomy Manor Life and Skills Building	\$1,733,500
Drake Village Hauser Building	\$2,062,455
Total Cost of the Activity/Project →	\$3,795,955.00

b) Show only the Cost items to be paid by the CDBG Grant:

Staff Positions and Expense Items to be paid by this requested CDBG Grant during FY 2016-2017	Amount
Construction of Life and Skill Building and Drake Village Modernization	\$350,000.
Total Amount of this Grant Request for FY 2016-2017 →	\$350,000

c) Total sources of Income for the Proposed Activity, including CDBG funding:

All Sources of Income for this Activity/Project in FY 2016-2017 <i>(for example, town grants, state contracts, other federal funds, foundation and corporate grants, donations, etc.)</i>	Anticipated Amount from Each Source
Amount of this C.D.B.G. grant request (Same as total of 1.b.) →	\$350,000.00
DHCD High Leverage Asset Preservation Program (HILAPP)	\$2,919,965.00
Prior CDBG Grants 2013-2015	\$550,000.00
Total Funding for the Activity/Project →	\$3,819,965.00

CERTIFICATION

I CERTIFY THAT ALL INFORMATION THAT IS SUBMITTED WITH THIS APPLICATION IS TRUE AND ACCURATE.

Signature

Name

John J. Griffin

Title

Executive Director.

Arlington Housing Authority Annual Income Limit Report

Menotomy Manor

1) Project: Menotomy Manor, 2) Income Limit Type: 2014 Income Limit, 3) Income Limits Effective: 8/9/2014, 4) Admission Dates: From 1/1/1900 To 1/1/9999,
5) Tenant Status: Active Only Tenants

No. in Household	Annual Income No. of Families	Annual Income No. of Families	Annual Income No. of Families	Annual Income No. of Families	Total Families
	Low Income	Very Low Inc.	Extremely Low		
	\$47,450	\$32,950	\$19,800	Over 80%	
1	3	1	2	0	6
	\$54,200	\$37,650	\$22,600	Over 80%	
2	11	8	30	5	54
	\$61,000	\$42,350	\$25,450	Over 80%	
3	7	12	27	1	47
	\$67,750	\$47,050	\$28,250	Over 80%	
4	10	14	20	1	45
	\$73,200	\$50,850	\$30,550	Over 80%	
5	3	5	12	1	21
	\$78,600	\$54,600	\$32,800	Over 80%	
6	0	2	1	0	3
Total Families					176

Annual Income Limit Summary

Income Bracket	Total Families
Low Income	34
Very Low Income	42
Extremely Low	92
Over 80% Income	8
Total Families	176

Arlington Housing Authority

Tenant Statistical Summary Report

Program: Massachusetts 200 Program Project: **Menotomy Manor**

Admission Dates From 2/1/1973 Thru 2/19/2016 County: All Census Tract: All Case Worker: All

Number of Persons in Household		
Household Size	Total Families	%
1	6	3.41 %
2	54	30.68 %
3	47	26.70 %
4	45	25.57 %
5	21	11.93 %
6	3	1.70 %
Total Families:	176	

Citizenship Composition of Household		
Citizenship	Total Members	%
Eligible Citizen	537	96.24 %
Eligible NonCitizen	20	3.58 %
Pending Verification	1	0.18 %
Total Citizenships:	558	

Racial Composition of Household		
Primary Race (Non Hispanic)	Total Members	%
White	318	56.99 %
Black	95	17.03 %
Indian	7	1.25 %
Asian	138	24.73 %
Total (Non Hisp) Members:	558	

Ethnicity Composition of Household		
Ethnicity	Total Members	%
Non Hispanic	484	86.74 %
Hispanic	74	13.26 %
Total Members:	558	

Number of Adults in Household		
Number Adults	Total Families	%
1	45	25.57 %
2	93	52.84 %
3	27	15.34 %
4	9	5.11 %
5	2	1.14 %
Total Families:	176	

Number of Children in Household		
Number Children	Total Families	%
0	64	36.36 %
1	48	27.27 %
2	44	25.00 %
3	16	9.09 %
4	4	2.27 %
Total Families:	176	

Employed Adults in Household		
Number Employed Adults	Total Families	%
0	39	22.16 %
1	94	53.41 %
2	40	22.73 %
3	3	1.70 %
Total Families:	176	

Number of Relationships in Household		
Relationship	Total Members	%
Other Adult	63	11.29 %
Full-Time Student 18+	42	7.53 %
Head	176	31.54 %
Co-Head	19	3.41 %
Spouse	56	10.04 %
Other Youth Under 18	202	36.20 %
Total Relationships:	558	

Age of Male Family Members		
Age	Total Members	%
0 - 4	26	11.71 %
5 - 13	41	18.47 %
14 - 17	15	6.76 %
18 - 24	16	7.21 %
25 - 44	59	26.58 %
45 - 59	46	20.72 %
60 - 64	5	2.25 %
65 - 69	7	3.15 %
70 - 74	2	0.90 %
75 - 79	4	1.80 %
80 & Over	1	0.45 %

Age of Female Family Members		
Age	Total Members	%
0 - 4	19	5.65 %
5 - 13	67	19.94 %
14 - 17	32	9.52 %
18 - 24	59	17.56 %
25 - 44	73	21.73 %
45 - 59	69	20.54 %
60 - 64	6	1.79 %
65 - 69	5	1.49 %
70 - 74	1	0.30 %
75 - 79	4	1.19 %
80 & Over	1	0.30 %

Total Male Members: 222

Age of Male Head of Households		
Age	Total Families	%
< 18	0	0.00 %
18 - 24	0	0.00 %
25 - 44	22	36.67 %
45 - 59	28	46.67 %
60 - 64	1	1.67 %
65 - 70	6	10.00 %
71 & Over	3	5.00 %
Total Families:	60	

Total Female Members: 336

Age of Female Head of Households		
Age	Total Families	%
< 18	0	0.00 %
18 - 24	2	1.72 %
25 - 44	50	43.10 %
45 - 59	56	48.28 %
60 - 64	4	3.45 %
65 - 70	3	2.59 %
71 & Over	1	0.86 %
Total Families:	116	

Household Income		
Annual Income	Total Families	%
0 - 4,999	11	6.25 %
5,000 - 9,999	14	7.95 %
10,000 - 14,999	19	10.80 %
15,000 - 19,999	19	10.80 %
20,000 - 24,999	25	14.20 %
25,000 - 34,999	26	14.77 %
35,000 - 44,999	33	18.75 %
45,000 - 999,999	29	16.48 %
Total Families:	176	

Source of Household Income		
Source of Income	Total Members	%
Child Support	23	6.61 %
Federal Wage	2	0.57 %
General Assistance	9	2.59 %
Other Nonwage Sources	5	1.44 %
Other Wage	206	59.20 %
Own Business	1	0.29 %
Pension	3	0.86 %
Social Security	56	16.09 %
SSI	38	10.92 %
TANF Assistance	4	1.15 %
Unemployment Benefits	1	0.29 %
Total Income Sources:	348	

Positive Tenant Rent Ranges		
Rent Range	Total Families	%
0 - 49	7	3.98 %
50 - 79	3	1.70 %
80 - 99	2	1.14 %
100 - 149	10	5.68 %
150 - 199	4	2.27 %
200 - 99,999	150	85.23 %
Total Families:	176	

Negative Tenant Rent Ranges		
Rent Range	Total Families	%
(1) - (49)	0	0.00 %
(50) - (79)	0	0.00 %
(80) - (99)	0	0.00 %
(100) - (149)	0	0.00 %
(150) - (199)	0	0.00 %
(200) - (99,999)	0	0.00 %
Total Families:	0	

Voucher/Bedroom Size		
Size	Total Families	%
2	93	52.84 %
3	83	47.16 %
Total Families:	176	

Unit Structure Type (Section 8 Only)		
Structure Type	Total Families	%
Unknown	0	NaN
Total Structure Types:	0	

Member Status		
Status	Total Members	%
Non Elderly / Non Disabled	500	89.61 %
Elderly/ Non Disabled	28	5.02 %
Non Elderly / Disabled	27	4.84 %
Elderly / Disabled	3	0.54 %
Total Members:	558	

Single Household		
	Total Families	%
Single Household	6	3.41 %

Arlington Housing Authority Annual Income Limit Report

Elderly / Disabled

1) Project: 667C Project, 2) Income Limit Type: 2014 Income limit, 3) Income Limits Effective: 8/9/2014, 4) Admission Dates: From 1/1/1900 To 1/1/9999,
5) Tenant Status: Active Only Tenants

No. in Household	Annual Income No. of Families	Annual Income No. of Families	Annual Income No. of Families	Annual Income No. of Families	Total Families
	Low Income	Very Low Inc.	Extremely Low		
	\$47,450	\$32,950	\$19,800	Over 80%	
1	34	117	293	9	453
	\$54,200	\$37,650	\$22,600	Over 80%	
2	5	7	47	2	61
				Total Families	514

Annual Income Limit Summary

Income Bracket	Total Families
Low Income	39
Very Low Income	124
Extremely Low	340
Over 80% Income	11
Total Families	514

Arlington Housing Authority

Tenant Statistical Summary Report

Program: Massachusetts State 667 Project: **Elderly/Disabled**

Admission Dates From 2/1/1973 Thru 2/19/2016 County: All Census Tract: All Case Worker: All

Number of Persons in Household		
Household Size	Total Families	%
1	450	87.72 %
2	63	12.28 %
Total Families:	513	

Citizenship Composition of Household		
Citizenship	Total Members	%
Eligible Citizen	508	88.50 %
Eligible NonCitizen	66	11.50 %
Total Citizenships:	574	

Racial Composition of Household		
Primary Race (Non Hispanic)	Total Members	%
White	464	80.84 %
Black	17	2.96 %
Indian	2	0.35 %
Asian	91	15.85 %
Total (Non Hisp) Members:	574	

Ethnicity Composition of Household		
Ethnicity	Total Members	%
Non Hispanic	557	97.04 %
Hispanic	17	2.96 %
Total Members:	574	

Number of Adults in Household		
Number Adults	Total Families	%
1	452	88.11 %
2	61	11.89 %
Total Families:	513	

Number of Children in Household		
Number Children	Total Families	%
0	513	100.00 %
Total Families:	513	

Employed Adults in Household		
Number Employed Adults	Total Families	%
0	442	86.16 %
1	71	13.84 %
Total Families:	513	

Number of Relationships in Household		
Relationship	Total Members	%
Other Adult	3	0.52 %
Head	513	89.37 %
Spouse	58	10.10 %
Total Relationships:	574	

Age of Male Family Members		
Age	Total Members	%
0 - 4	0	0.00 %
5 - 13	0	0.00 %
14 - 17	0	0.00 %
18 - 24	0	0.00 %
25 - 44	3	1.26 %
45 - 59	28	11.76 %
60 - 64	28	11.76 %
65 - 69	30	12.61 %
70 - 74	42	17.65 %
75 - 79	44	18.49 %
80 & Over	63	26.47 %
Total Male Members:	238	

Age of Female Family Members		
Age	Total Members	%
0 - 4	0	0.00 %
5 - 13	0	0.00 %
14 - 17	0	0.00 %
18 - 24	0	0.00 %
25 - 44	2	0.60 %
45 - 59	38	11.31 %
60 - 64	24	7.14 %
65 - 69	57	16.96 %
70 - 74	59	17.56 %
75 - 79	46	13.69 %
80 & Over	110	32.74 %
Total Female Members:	336	

Age of Male Head of Households		
Age	Total Families	%
< 18	0	0.00 %
18 - 24	0	0.00 %
25 - 44	3	1.56 %
45 - 59	24	12.50 %
60 - 64	23	11.98 %
65 - 70	34	17.71 %
71 & Over	108	56.25 %

Age of Female Head of Households		
Age	Total Families	%
< 18	0	0.00 %
18 - 24	0	0.00 %
25 - 44	2	0.62 %
45 - 59	37	11.53 %
60 - 64	22	6.85 %
65 - 70	61	19.00 %
71 & Over	199	61.99 %

Total Families: 192

Household Income		
Annual Income	Total Families	%
0 - 4,999	30	5.85 %
5,000 - 9,999	50	9.75 %
10,000 - 14,999	149	29.04 %
15,000 - 19,999	112	21.83 %
20,000 - 24,999	72	14.04 %
25,000 - 34,999	61	11.89 %
35,000 - 44,999	24	4.68 %
45,000 - 999,999	15	2.92 %
Total Families:	513	

Positive Tenant Rent Ranges		
Rent Range	Total Families	%
0 - 49	5	0.97 %
50 - 79	3	0.58 %
80 - 99	6	1.17 %
100 - 149	22	4.29 %
150 - 199	15	2.92 %
200 - 99,999	462	90.06 %
Total Families:	513	

Voucher/Bedroom Size		
Size	Total Families	%
0	1	0.19 %
1	512	99.81 %
Total Families:	513	

Member Status		
Status	Total Members	%
Non Elderly / Non Disabled	3	0.52 %
Elderly/ Non Disabled	471	82.06 %
Non Elderly / Disabled	68	11.85 %
Elderly / Disabled	32	5.57 %
Total Members:	574	

Total Families: 321

Source of Household Income		
Source of Income	Total Members	%
Child Support	1	0.10 %
Federal Wage	9	0.93 %
General Assistance	39	4.02 %
Other Nonwage Sources	60	6.19 %
Other Wage	69	7.12 %
Pension	197	20.33 %
Social Security	407	42.00 %
SSI	187	19.30 %
Total Income Sources:	969	

Negative Tenant Rent Ranges		
Rent Range	Total Families	%
(1) - (49)	0	0.00 %
(50) - (79)	0	0.00 %
(80) - (99)	0	0.00 %
(100) - (149)	0	0.00 %
(150) - (199)	0	0.00 %
(200) - (99,999)	0	0.00 %
Total Families:	0	

Unit Structure Type (Section 8 Only)		
Structure Type	Total Families	%
Unknown	0	NaN
Total Structure Types:	0	

Single Household		
	Total Families	%
Single Household	452	88.11 %



Commonwealth of Massachusetts
**DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT**

Deval L. Patrick, Governor ♦ Aaron Gornstein, Undersecretary

February 18, 2014

Mr. John J. Griffin, Jr., Executive Director
Arlington Housing Authority
4 Winslow St.
Arlington, MA 02474-3062

RE: HILAPP Project Proposal 667-01 Drake Village

Dear Mr. Griffin:

On August 21, 2013, the Department of Housing and Community Development (DHCD) granted a semi-finalist designation to the Arlington Housing Authority for its \$2.7M High Leverage Asset Preservation Program (HILAPP) proposal to modernize and rehabilitate the Drake Village (667-01) state public housing development. I am writing today to confirm DHCD's continued support for this important project and to further elaborate on status of HILAPP funding.

HILAPP awards extra capital improvement funds to the state's most distressed public housing developments in situations where the housing authority can secure at least 33% of the budget from matching funds (50 cents for every DHCD dollar). Most HILAPP applicants did not have matching funds in-hand at the time of June 2013 application deadline, and so DHCD has made conditional commitments to fund projects so long as the applicant presented a viable scope of work and a reasonable plan for securing match sources.

The Arlington Housing Authority presented a strong HILAPP proposal for the Drake Village rehabilitation project, which proposes to increase handicap accessibility, renovate kitchen and baths, install energy efficient appliances, replace windows, hardwire smoke detectors, and upgrade electrical wiring. As a result, DHCD has not only given the project semi-finalist status, but also funded the technical assistance needed to further refine the scope with support from consultants from Recap Advisors, secured through the Massachusetts Housing Partnership.

Once the Arlington Housing Authority has:

- Finalized a DHCD-approved scope of work,
- Proposed a viable financing plan, and
- Secured firm funding commitments from non-state sources (currently anticipated as the local CDBG and/or HOME programs)

then DHCD expects to issue, subject to appropriation, a commitment of HILAPP capital funding for up to two-thirds of the project budget, with an immediate partial award to complete design and produce a DHCD-approved bid set of plans and specifications. Once the AHA receives construction bids within the approved budget, DHCD will supplement the partial award with additional funds to cover up to two-thirds of the project's total development cost.

Thank you again for your commitment to preserve public housing and promote enhanced services and supports to seniors in public housing. If you or the Town has any questions about this process, please contact Amy Stitely, Director of Policy and Program Development at 617-573-1156.

Sincerely,

A handwritten signature in black ink, appearing to read 'Lizbeth Heyer', written over a circular stamp.

Lizbeth Heyer
Associate Director for Public Housing and Rental Assistance



Massachusetts
Housing
Partnership

February 14, 2014

Carol Kowalski
Director of Planning
Town of Arlington
Arlington, MA 02476

Dear Ms. Kowalski,

I am writing to support the Arlington Housing Authority's request for a firm commitment of CDBG funds to leverage state HILAPP funding for the renovation of units at Drake Village.

The Massachusetts Housing Partnership (MHP) is assisting the Department of Housing and Community Development in the HILAPP program administration. As you know from the housing authority's previous application, HILAPP is a limited state funding program created to leverage local funding and support the rehabilitation of state public housing. MHP is coordinating technical assistance to support housing authorities that have applied for funding and have strong project concepts but need additional assistance to finalize a detailed capital improvement plan.

The Arlington Housing Authority's application is unique and its timing important as the state explores how to expand and deepen services to seniors in public housing, allowing them to age in place longer. Drake Village is physically the perfect setting to further elevate what the housing authority is doing and enhance a supportive senior village for some of our most vulnerable citizens. The units at Drake Village are not designed for seniors using wheelchairs or walkers and the goal is to adapt as many units as needed.

To help assess the capital improvement needs and the supportive service delivery, MHP has contracted with Recap Advisors to work with the Arlington Housing Authority. Recap Real Estate Advisors is an affordable housing consulting firm based in Boston with national experience working with housing authorities around all of the issues the Arlington Housing Authority is looking to address.

I hope the Town of Arlington can help leverage state dollars to assist the AHA to create the best possible living situation for elders at Drake Village.

I am happy to answer any specific questions that you may have.

Sincerely,

Susan Connelly
Director
Community Housing Initiatives

160 Federal Street
Boston, Massachusetts 02110
Tel: 617-330-9955
Fax: 617-330-1919

462 Main Street
Amherst, Massachusetts 01002
Tel: 413-253-7379
Fax: 413-253-3002

www.mhp.net

F.1. Letter of Support from the Town of Arlington



TOWN OF ARLINGTON
MASSACHUSETTS 02476
781 - 316 - 3090

DEPARTMENT OF PLANNING and
COMMUNITY DEVELOPMENT

March 20, 2014

Susan Connelly
Massachusetts Housing Partnership
16 Federal Street
Boston, MA 02110

Dear Ms. Connelly,

I write this letter in strong support of the Arlington Housing Authority's application for HILAPP funds. Arlington strongly supports affordable housing construction and retention. The Town works very closely with the Housing Authority in support of the units and services they provide to our low and moderate income community. The Town annually sets aside funds for AHA to maintain and expand their supply of affordable housing, and to their Outreach, After School and Homework Support programs.

In the past the Town has allocated funds to the AHA in support of their housing programs. Last year AHA received \$50,000 in CDBG funds. While we cannot commit future years' funding because of its uncertainty, it is likely that the Town would support an application to renovate the existing units at Drake Village and the Hauser Building. The high leverage ratio of a project with HILAPP funds would be considered favorably.

Thank you for considering this application from the Arlington Housing Authority. Please let me know if I can provide you with any other information about the Town's support for the project, our CDBG funding, or our affordable housing programs.

Sincerely,

A handwritten signature in black ink, appearing to read 'Carol Kowalski'.

Carol Kowalski
Director of Planning

**Schematic Design Report
for the New Life & Skills Center
at Menotomy Manor 200-1, 200-2
Project # 010081**

submitted to the
Arlington Housing Authority
4 Winslow Street, Arlington, MA 02474

and to the
Department of Housing and Community Development
100 Cambridge Street, Suite 300, Boston, MA 02114

on
February 4, 2016

by
Elton + Hampton Architects
103 Terrace Street, Boston, MA 02120

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SUMMARY OF INFORMATION GATHERING, INTERVIEWS WITH STAFF & RESIDENTS

Review of revisions to the Programming section of the Concepts Report

In the original Concepts Report submitted on November 11, 2015, the estimated total area needed for the given program was between 5330 and 7315 SF, with an additional 800-1130 SF for circulation and 1150-1400 if an elevator were needed. During the Concepts Report review meeting held on December 9th, the programmatic areas were adjusted and, for many rooms, reduced. The Concepts Report was revised accordingly (see Appendix).

In summary, some activities and uses would allow for shared spaces, such as meeting areas and kitchen. The following spaces retain the original proposed square footage: Property Manager's Office (120), Police Substation (120), Food Pantry (150) and will remain separate from the Kitchen, Maintenance (from 400-550 sf to 500 sf, and will include a unisex restroom of 90 sf); Women's Restroom (from 150-200) to 150 sf; Mechanical Room (120); Electrical Room (120)

The following rooms retained the higher end of or greater than the proposed square footages:

- Operation Success (from 300-500 SF to 500 SF) needs two lockable offices, and kitchen, open areas and meeting room can be shared with other building programs.
- Meeting Room, not in the original list of programmatic areas, AHA requested a meeting room (150 sf) that can accommodate up to six people and that will be shared among the Property Manager and the after-school programs.

After discussion, the following programs' proposed areas were reduced to reflect expected number of users:

- Gathering Area/Speaking Room had been shown at 3000-5000 sf, but the maximum number of people that AHA typically sees at community meetings is 25, so the space can be reduced to 1000 SF.
- Boys' & Girls' Club requires only a large lockable closet for arts & crafts materials and games to be stored.
- Kitchen was reduced (from 250-300 sf to 200 sf) but should be designed to meet full MAAB/ADA compliance as it will be shared among the manager, police, maintenance staff, and after-school programs.
- Men's Restroom (from 110-125) to 100 sf.

As a result of the reduced room square footages, the circulation (calculated at 25% of the subtotal) will also be reduced. If an elevator is installed, the square footage would not be as great as the original Concepts Report held (1150-1400 for up to three stories duplicated the circulation space: Basement, 1st and 2nd floors) to 120-180 SF. If a lift is installed instead of an elevator, the area needed varies from 50-100 SF, depending on whether there is one lift or there are two.

Based on the revised required areas, the total square footage needed, if on one floor, would be 4210 SF. If an elevator is required the required area would be 4330-4400 SF, depending on how many floors. If a lift is used, the area required would be 4260-4310 SF. The layout options (assuming equal-sized floors) would be thus:

- 4340 sf : one floor
- 2170-2464 sf: per floor on basement & 1st floor
- 1447-1643 sf: per floor on basement, 1st, and 2nd floors

The Concepts Report listed four options for siting the building:

1. Expanding Existing Administration Building to House All Programmatic Needs
2. Razing the Existing Administration Building and Constructing New Building to House All Programmatic Needs
3. Constructing a New Building at One of the Two Larger Parking Lots on the Site
4. Divide programs into two smaller buildings:
 - a. renovating and expanding existing admin building to house police substation and maintenance
 - b. constructing a new building to house property manager's office, after school programs, and larger gathering space.

Even with the reduced program area, only option 3, building on one of the larger parking lots, would allow for a new one-story building. Arlington Zoning Bylaws (Article 8, Section 8.03) require replacing existing parking elsewhere on the property, and the area where the existing administration building is located would not provide enough area to relocate the parking spaces lost.

In the December 9th meeting, AHA expressed a preference for the option that re-uses the existing building location rather than one of the two larger parking lots on this parcel. AHA also expressed a preference for the existing building to be razed and a new building constructed in its place (option 2 above). Expansion of the existing building (option 1 above) does not have sufficiently reinforced foundation walls to add another floor, and constructing a new building would afford the most flexibility for accommodating all of the programmatic needs.

The footprint of the existing administration building is 920 SF which allows room on both sides for seven parking spaces. AHA reports that on a daily, recurrent basis, parking is needed for the property manager, a police vehicle, a maintenance truck, and the Bobcat. The residents of 4-14 Fremont Court typically park in one of the larger parking lots on the east side of the Fremont Court loop, and the residents of 44-54 regularly park in one of the parking lots on the west side of the loop. The after-school programs are for children in the development, so they don't require parking spaces beyond what their households already use. The gathering space will mostly be used by residents, so again, additional parking is not required for that use.

Survey

Because the only survey of the Menotomy Manor Family Development site that EHA found among the file cabinets located at Hauser predated the construction of the development, we enlisted Feldman Surveyors to survey a limited area of the site, specifically Fremont Court from Fremont Street and the lower half of the Fremont Court loop. This captures the utilities tied to Fremont Street and those that

are under Fremont Court, and the two residential buildings 6-14 and 46-54 Fremont Court that flank the administrative building.

On January 6th, Feldman Surveyors began surveying the area immediately around the existing Administrative Building (2 Fremont Court), and on the 8th finished surveying. The plan that they drew includes the land just around and behind the existing building to include the greenway and rear footprint of the two residential buildings (46-54 and 6-14 Fremont Court) within the "island" surrounded by Fremont Court, and across Fremont Court to the west and east to the opposite sidewalks and south to where the water and storm lines join the respective mains on Fremont Street.

Although the survey includes electric and gas lines, the connections to the mains on Fremont Street are not shown. Feldman used gas line information from National Grid which showed gas diagrammatically entering only residential buildings 10-20 and 68-74 Fremont Street. No gas line is shown entering the Administrative building. When asked, Feldman reported that National Grid's drawing is the most up-to-date. Roland Demers, however, confirmed that there is gas service to all the residential buildings which have gas stoves and gas-fired heating equipment. There is also gas service in the Administrative building which has a gas-fired boiler and water storage tank. The Arlington Public works and the utility companies served as the basis of the surveyor's drawing, and no further information was available regarding the gas connecting the admin building to the shut-off located at the sidewalk just past the parking lot on the west side of the building. DigSafe may be able to find the underground gas route from the shut-off to the admin building.

The survey shows two electrical service lines running up Fremont Court and connecting to a single electrical service loop following Fremont Court. Branches run from the initial pair of service lines from Fremont Street to residential buildings 30-38 and 46-56 Fremont Street. From the loop, branches run to the other residential buildings that ring Fremont Court and the admin and two residential buildings located on the island. In addition to the underground electrical lines, there are overhead wires that run between a utility pole directly behind the admin building and a pole at the north side of 30-38 Fremont Street, and between the pole behind the admin building and a pole at the southwest corner of the island. An overhead wire also runs to the west end of the admin building roof from across Fremont Court near 22-28.

On January 11th after seeing scanned drawings on Roland Demers mobile phone, EHA obtained full-sized copies of storm and sewer main plans and profiles at the Engineering Department of the Arlington Public Works. An 18" storm drain runs from Fremont street up Fremont Court and up along the SE edge of 138-150 Fremont Court to a branch line along the easement just beyond and parallel to the northeast property line and branching to mains on North Union Street and on Gardner Street.. From the Admin building, the sewer runs back between the two residential buildings (46-54 and 6-14) to what is called Line B that eventually connects to the main on Gardner Street. The general routes of and manholes for the storm and sewer lines on these DPW drawings correspond with those shown on the survey.

The survey shows a water line coming from Fremont Street up Fremont Court and turning left, with a branch going to a water shut-off in the walkway at the north side of 22-28 Fremont Street, past 22-28

before turning right/north up Fremont. As with the gas lines, the water service route information was from the Public Works Office, and no specific routes from the mains to the admin building were found on any drawings. DigSafe may be able to find the underground water route from the branch lines to the admin building.

The survey plans does not show any existing fire sprinkler lines separate from the water, because there are currently no sprinklered buildings in the development. The new building will require a fire sprinkler system.

Asbestos and Lead

In 2007, the residential buildings at Menotomy Manor underwent kitchen and bath upgrades, as well as modification of buildings for accessible units. No work was done at the administrative building as part of that project.

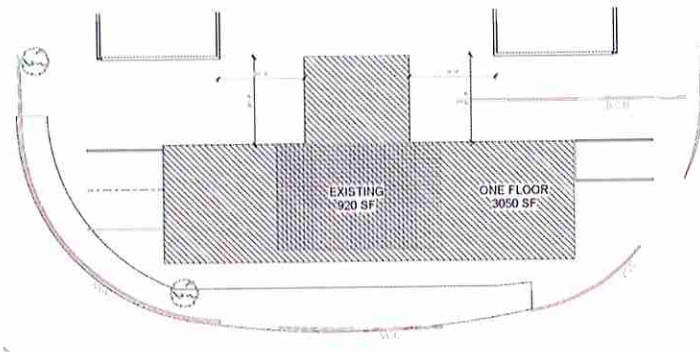
The kitchen/bath project's specifications division 2 has a section for asbestos abatement and one section titled "Lead-containing Paint Considerations." Asbestos containing material (ACM) was found in kitchen flooring, steel sink lining, waterproofing at the brick, flooring mastic, waterproofing adhesives at particle board under the flooring, cabinetry above stoves with heat shields; and waterproofing substrates beneath exterior brick, and the contractor for that project was responsible for verifying quantities and submitting a report of ACM before work started and then removing ACM. Lead based paint was determined to be present under siding at the wood duplex buildings at the development.

No work was done at the administrative building in 2007. So there was not testing for ACM or lead-based paint. Because it was built at the same time as the brick residential buildings, the administrative building likely contains similar materials as those found in the residential buildings.

Before demolition of the brick administrative building can begin, the ACM would have to be removed per US EPA and Massachusetts DEP protocol. Lead-based paint, if identified, will not have to be removed prior to demolition, but the disposal of the lead-based painted materials will have to be documented and conducted per EPA and Massachusetts DEP protocol. Testing for ACM and lead-based paint should be done.

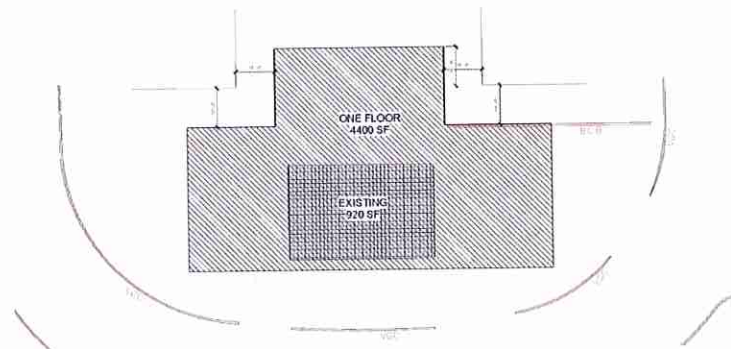
OPTIONS

From the December 9th Conceptions Report review meeting, EHA was directed to explore options for razing the existing administrative building and replacing with a building (one-story if possible and two-story). The existing building has a footprint of 23'x36' and is approximately 20'-0" from both residential buildings that flank it.



The small building footprint allows for three parking spaces to the west of the building and four spaces to the east of the building. According to the Arlington Bylaws parking requirements, all seven parking would have to be replaced. The analysis of the zoning code deems the building use as Business, and requires minimum of three parking spaces (reflecting the number of full-time employees which corresponds to what AHA reported: the property manager, a maintenance staff member's truck, and the police). Between four and six spaces can be configured with the proposed options (pages 8-11).

If the new building with revised program were to be one story, the area needed would be about 4200 sf. To fit a 4400 sf one-story building, with room for parking on either side, the distance between the new building and the residential buildings would be reduced to 10'-0" which would require a waiver from the zoning board.



If a one story building is the most viable option, and the setbacks are reduced to between 15'-0" and 20'-0", some of the programmatic areas would have to be reduced. The one-story option shown on page 8 is approximately 3500 sf. Many of the spaces are smaller than the revised Concepts Report allotted. The basic plan has a double-loaded corridor, and very simple volumes; only the Flex/Gathering Space has a raised ceiling/roof with possibility to add clerestory light.

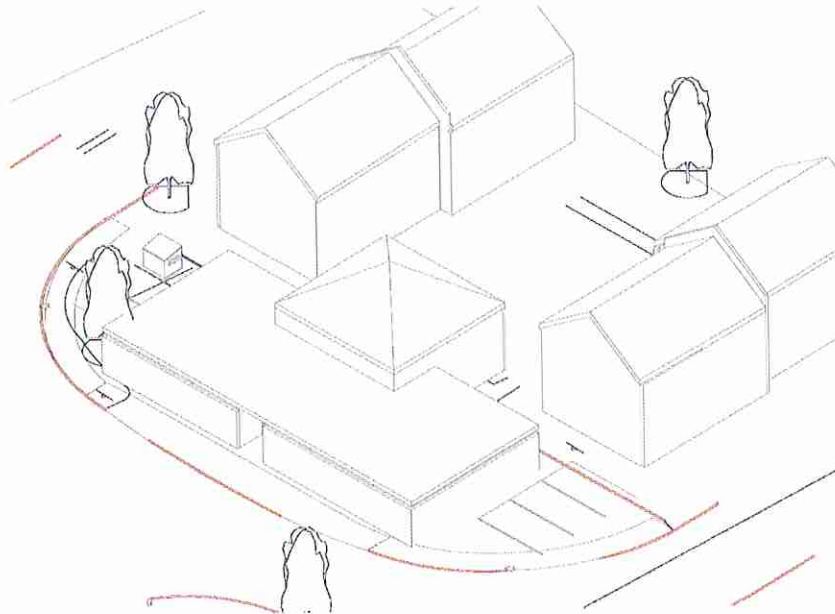
If two floors are required, the goal should be to fit as much of the program on the first floor as possible. If the first floor of the new building can accommodate about 3,000 sf, then the remaining 1200 sf or so could either be located at a basement level or at a second floor. A 3,000 sf full basement would be excessive. Instead, only 1200 sf or so would be a full basement, the rest could be crawl space or slab on grade. Likewise, the second floor need not be the full 3,000 sf.

Installing an elevator would seem expensive for the number of occupants who may require it. A platform lift can travel up to 14'-0" between two floors. This would be the most cost effective means for providing accessibility to both floors.

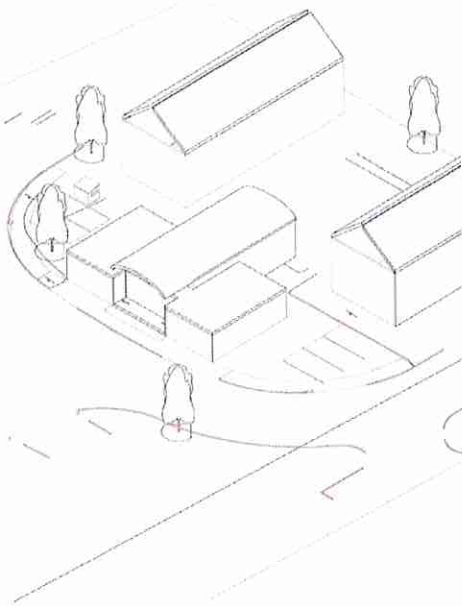
There are two two-story options shown on pages 9-11. Option 1 has a first floor and second floor/mezzanine. The plan is symmetric with a raised central volume that extends into the courtyard between the two residential buildings. Operation Success, the police substation, and the shared meeting room are on the second floor, along with a restroom. The advantage to this plan is that Maintenance is on the first floor and easily accessed next to the smaller but preserved parking area on the west.

Option 2 has a first floor and partial basement. Unlike the one-story option and two-story Option 1, this plan is less symmetrical: the Flex/Gathering space is to the right of the entry and is the largest volume. The smaller volume housing Operation Success extends into the green area between the two residential buildings. Only Maintenance and the mechanical and electrical rooms are in the basement. An elevator might be the better choice if materials, tools and equipment are in the basement. During the December 9th meeting, however, Roland Demers reported that most of the stock (e.g. appliances, cabinets, plumbing fixtures) are stored at the garage located at Drake Village. A storage closet for lawn and snow equipment could be carved out of the first floor Operation Success space and open directly outside next to a walkway. The alternative to an elevator is to install a platform lift outside that serves the Maintenance area exclusively.

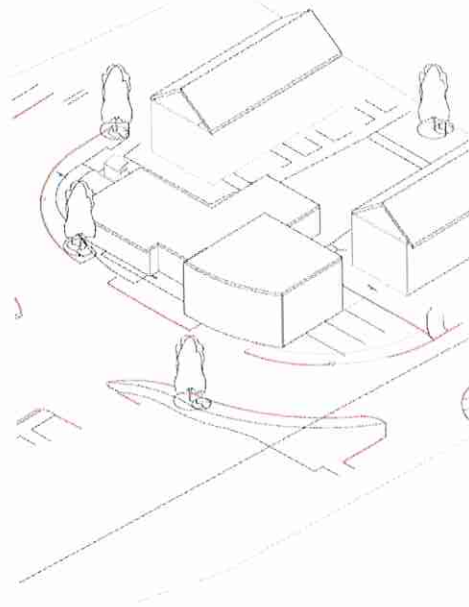
ONE-STORY OPTION



TWO-STORY OPTIONS

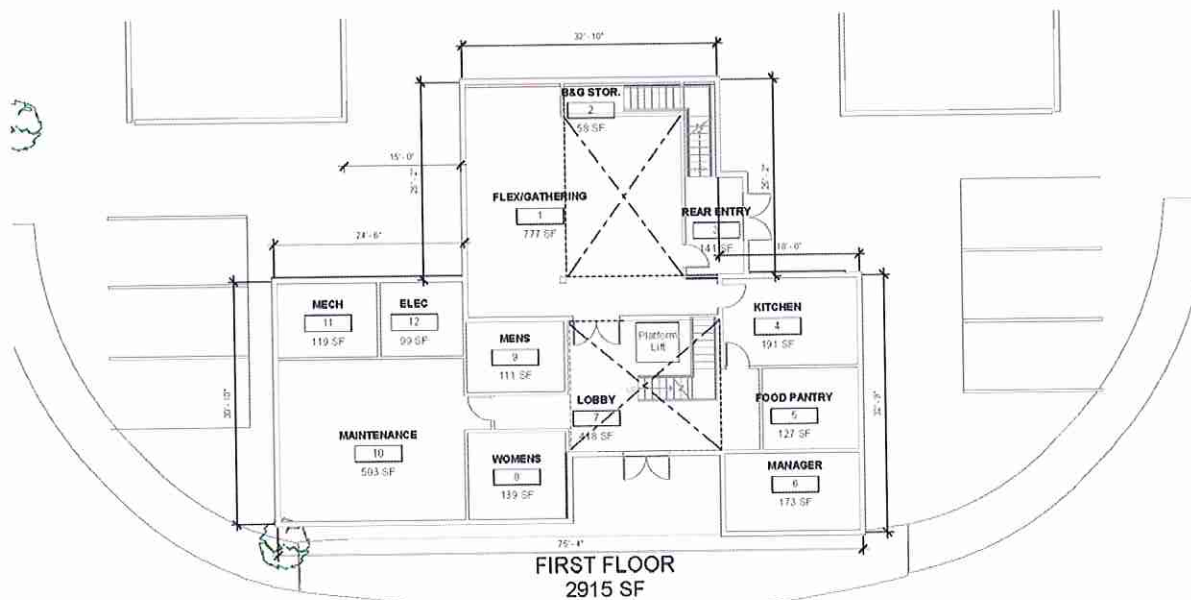
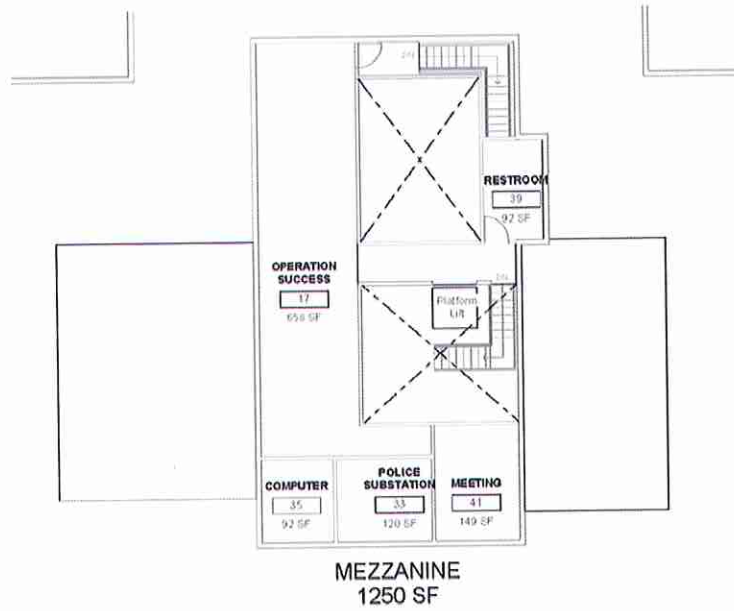


OPTION 1 (4165 Sf)

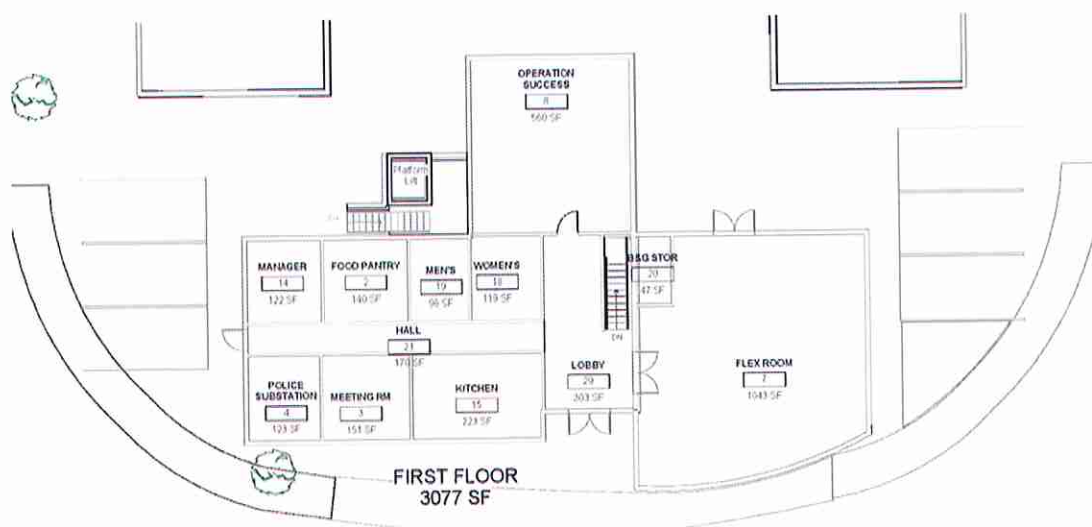


OPTION 2 (4168 SF)

FIRST FLOOR (2915 SF)		BASEMENT (1091 SF)	
	Flex Gathering Room		Maintenance
	Boys & Girls Club Storage		Mechanical Room
	Manager's Office		Electrical Room
	Food Pantry		Men's Room
	Kitchen		Women's Room
	Maintenance		
	Mechanical Room		
	Electrical Room		
	Men's Room		
	Women's Room		
MEZZANINE (1250 SF)		FIRST FLOOR (3077 SF)	
	Operation Success		Flex Gathering Room
	Police Substation		Food Pantry
	Meeting Room		Boys & Girls Club Storage
	Men's Room		Kitchen
	Women's Room		Manager's Office
			Food Pantry
			Operation Success
			Police Substation
			Meeting Room
			Men's Room
			Women's Room



OPTION 1



OPTION 2

COST ESTIMATES

		ONE-STORY			
	BLUE indicates Filed Sub-bid	QTY	UNITS	UNIT COST	SUBTOTAL
024100	DEMO			4,000.00	
028200	ASBESTOS & LEAD REMOVAL			4,700.00	
028300					
321200, 329000, 330000	SITEWORK			53,140.00	
033000	CONCRETE			110,825.00	
042000	MASONRY			24,000.00	
051000	STRUCTURAL STEEL			26,800.00	
055500	MISC. METALS			-	
061000	ROUGH CARPENTRY			70,084.25	
062000	FINISH CARPENTRY			20,575.00	
075000	MEMBRANE ROOFING			33,600.00	
073000	ASPHALT SHINGLE ROOFING			7,560.00	
07----	METAL ROOF			-	
076200	SHEET METAL FLASHING & TRIM			37,550.00	
071000	WATERPROOFING & DAMPPROOFING			3,300.00	
7F	FIRESTOPPING			200.00	
079000	JOINT SEALANT			18,450.00	
072000	INSULATION			31,500.00	
081000, 084000, 085000, 087000	DOORS, WINDOWS, STOREFRONT, HARDWARE, GLAZING			96,800.00	
09 --	FINISHES			93,019.50	
100000	SPECIALTIES			12,050.00	
113100	RESIDENTIAL APPLIANCES			4,050.00	
123000	CASEWORK			25,000.00	
230000	HVAC			35,000.00	
220000	PLUMBING			34,000.00	
210000	FIRE SUPPRESSION - SPRINKLER			12,000.00	
260000	ELECTRICAL			50,025.00	
280000	FIRE ALARM			32,900.00	
280000	ELECTRONIC SAFETY & SECURITY			21,460.00	
					\$ 1,112,423.75
	GENERAL CONDITIONS			10%	\$ 111,242.38
	OVERHEAD			10%	\$ 122,366.61
	PROFIT			5%	\$ 67,301.64
	BOND			2.50%	\$ 35,333.36
	GRAND TOTAL				\$ 1,448,667.73

		TWO -STORY (1st & Mezzanine)			
	BLUE indicates Filed Sub-bid	QTY	UNITS	UNIT COST	SUBTOTAL
024100	DEMO			4,000.00	
028200	ASBESTOS & LEAD REMOVAL			4,700.00	
028300					
321200, 329000, 330000	SITEWORK			53,190.00	
033000	CONCRETE			96,095.00	
042000	MASONRY			18,720.00	
051000	STRUCTURAL STEEL			46,800.00	
055500	MISC. METALS			7,000.00	
061000	ROUGH CARPENTRY			117,401.25	
062000	FINISH CARPENTRY			26,675.00	
075000	MEMBRANE ROOFING			19,500.00	
073000	ASPHALT SHINGLE ROOFING			-	
07----	METAL ROOF			10,500.00	
076200	SHEET METAL FLASHING & TRIM			45,100.00	
071000	WATERPROOFING & DAMPPROOFING			2,887.50	
7F	FIRESTOPPING			500.00	
079000	JOINT SEALANT			21,750.00	
072000	INSULATION			35,250.00	
081000, 084000, 085000, 087000	DOORS, WINDOWS, STOREFRONT, HARDWARE, GLAZING			97,600.00	
09 -- --	FINISHES			142,723.50	
100000	SPECIALTIES			15,540.00	
113100	RESIDENTIAL APPLIANCES			4,050.00	
123000	CASEWORK			25,000.00	
230000	HVAC			40,000.00	
220000	PLUMBING			42,000.00	
210000	FIRE SUPPRESSION - SPRINKLER			13,500.00	
260000	ELECTRICAL			51,386.00	
280000	FIRE ALARM			38,110.00	
280000	ELECTRONIC SAFETY & SECURITY			22,220.00	
					\$ 1,389,393.25
	GENERAL CONDITIONS			10%	\$ 138,939.33
	OVERHEAD			10%	\$ 152,833.26
	PROFIT			5%	\$ 84,058.29
	BOND			2.50%	\$ 44,130.60
	GRAND TOTAL				\$ 1,809,354.73

		TWO-STORY (Basement & 1st)			
	BLUE indicates Filed Sub-bid	QTY	UNITS	UNIT COST	SUBTOTAL
024100	DEMO			4,000.00	
028200	ASBESTOS & LEAD REMOVAL			4,700.00	
028300					
321200, 329000, 330000	SITEWORK			53,190.00	
033000	CONCRETE			128,265.00	
042000	MASONRY			21,600.00	
051000	STRUCTURAL STEEL			36,800.00	
055500	MISC. METALS			14,000.00	
061000	ROUGH CARPENTRY			110,625.00	
062000	FINISH CARPENTRY			27,835.00	
075000	MEMBRANE ROOFING			36,924.00	
073000	ASPHALT SHINGLE ROOFING			-	
07----	METAL ROOF			8,750.00	
076200	SHEET METAL FLASHING & TRIM			38,750.00	
071000	WATERPROOFING & DAMPPROOFING			4,125.00	
7F	FIRESTOPPING			500.00	
079000	JOINT SEALANT			21,750.00	
072000	INSULATION			37,192.50	
081000, 084000, 085000, 087000	DOORS, WINDOWS, STOREFRONT, HARDWARE, GLAZING			104,900.00	
09 -- --	FINISHES			172,059.50	
100000	SPECIALTIES			15,640.00	
113100	RESIDENTIAL APPLIANCES			4,050.00	
123000	CASEWORK			25,000.00	
230000	HVAC			40,000.00	
220000	PLUMBING			42,000.00	
210000	FIRE SUPPRESSION - SPRINKLER			13,500.00	
260000	ELECTRICAL			50,922.00	
280000	FIRE ALARM			38,110.00	
280000	ELECTRONIC SAFETY & SECURITY			21,745.00	
					\$ 1,461,462.00
	GENERAL CONDITIONS		10%		\$ 146,146.20
	OVERHEAD		10%		\$ 160,760.82
	PROFIT		5%		\$ 88,418.45
	BOND		2.50%		\$ 46,419.69
	GRAND TOTAL				\$ 1,903,207.16

LIST OF ANTICIPATED DRAWINGS

Cover Sheet
List of Drawings, Code Analysis

EXISTING

Existing Site

Existing Site Plan
Existing Site Survey

Existing Floor Plans 1/8" = 1'-0"

XA1-1 Basement First Floor, Attic & Roof Plans

Existing Elevations 1/8" = 1'-0"

XA2-1 West, South, East & North Elevations

Existing Building Sections 1/8" = 1'-0"

XA3-1 Longitudinal & Transverse

PROPOSED

Site

L-1 Proposed Site Plan & Details
L-2 Proposed Landscaping Plan & Details

Civil

C-1 Proposed Utility Plan & Details

Floor Plans 1/8" = 1'-0"

A1-1 Basement & 1st Floor Plans
A1-2 2nd Floor Plan

Elevations 1/8" = 1'-0"

A2-1 West, South & East Elevations
A2-2 North Elevation, Hidden Elevations

Building Sections 1/8" = 1'-0"

A3-1 Longitudinal
A3-2 Transverse

Proposed Enlarged Floor Plans 1/4" = 1'-0"

A4-1 Gathering Room, Kitchen, Pantry, Operation Success, & Offices
A4-2 Maintenance, Restrooms

Proposed Wall & Floor Types, Sections & Details

- A5-1 Proposed Wall & Floor Types, Wall Sections
- A5-2 Proposed Details

Proposed Window, Door & Door Frame Elevations & Schedules

- A6-1 Window, Door & Door Frame Elevations, Details & Schedule

Proposed Interior Elevations

- A7-1 Gathering Room, Kitchen, Pantry, Operation Success, & Offices
- A7-2 Maintenance, Restrooms

Fire Protection

- FP1-1 Basement & 1st Floor Fire Protection Plans
- FP1-2 2nd Floor Fire Protection Plan, Details & Narrative

Electrical

- E1-1 Basement & 1st Floor Electrical Plans
- E1-2 2nd Floor Electrical Plan, Riser diagrams & Details

Fire Alarm

- FA1-1 Basement & 1st Floor Fire Alarm Plans
- FA1-2 2nd Floor Fire Alarm Plan, Riser diagrams & Details

CODES AND REGULATIONS

International Building Code Review

- A. According to the International Building Code (IBC) 2009 this building occupancy type as B – Business.
- B. Accessible means of egress required.
1007.1 calls for no less than two *accessible means of egress* but an exception is listed:
2. One *accessible means of egress* is required from an *accessible mezzanine* level in accordance with Section 1007.3 [Stairways], 1007.4 [Elevators] or 1007.5 [Platform lifts].
- C. Number of Exits and Continuity
1021.2 Single exits. Only one exit shall be required from Group R-3 occupancy buildings or from stories of other buildings as indicated in Table 1021.2. Occupancies shall be permitted to have a single *exit* in buildings otherwise required to have more than one *exit* if the areas served by the single *exit* do not exceed the limitations of Table 1021.2. . . Basements with a single *exit* shall not be located more than one *story* below *grade plane*.
Table 1021.2 lists occupancy type B, first story or basement, with maximum 49 occupants per floor and 75 feet travel distance (may be increased to 100 feet in buildings fully equipped with an automatic sprinkler system).
- D. Wheelchair Lift
1007.5 Platform lifts. Platform (wheelchair) lifts shall not serve as part of an *accessible means of egress*, except where allowed as part of a required *accessible route* in Section 1109.7, Items 1 through 9. Standby power shall be provided in accordance with Chapter 27 for platform lifts permitted to serve as part of a *means of egress*.
1109.7 Lifts. Platform (wheelchair) lifts are permitted to be a part of a required *accessible route* in new construction where indicated in Items 1 through 10. Platform (wheelchair) lifts shall be installed in accordance with ASME A18.1.
3. An *accessible route* to spaces that are not open to the general public with an occupant load of not more than five.

Town of Arlington Bylaws

- A. Title V, Article 15, Section 2. Applicability: Alteration of a developed property resulting in an increase to the impervious area of a lot by more than 350 square feet.
- B. Article 8 Off Street Parking and Loading Regulations
 - 1. Section 8.03 – Existing Spaces (ART. 82, ATM 4/80): Parking or loading spaces being maintained in any district in connection with any existing use on the effective date of this Bylaw, or any spaces subsequently provided in accordance with this Bylaw, shall not be decreased or in any way removed from service to the use originally intended to be served so long as said use remains, unless a number of parking or loading spaces is constructed elsewhere on property under the same ownership, provided: this regulation shall not require the maintenance of more parking or loading spaces than is required according to the tables.
 - 2. Section 8.05 – Combined Facilities (ART. 12, ATM/5/91): Parking required for two or more buildings or uses may be provided in combined facilities on the same or adjacent lots, by special permit from the ZBA, or in cases subject to Section 11.06, the ARB where it is evident that such facilities will continue to be available for the several buildings or uses.

3. ART. 70, ATM 3/77 Community facility (town building, recreation, etc.) requires one parking space per each three employees on the largest shift.
- C. Article 3, Section 3.01 – Menotomy Manor Development is located in the Residence 5 (R5) Residential District.
- D. Article 4, Section 4.03 – Existing Buildings and Land, ART. 3, ATM 4/89: This Bylaw shall not apply to existing buildings or structures, nor to the existing use of any building or structure or of land, to the extent to which it is legally used at the time of adoption of this Bylaw, but it shall apply to any change of use thereof and to any alteration of a building or structure when the same would amount to reconstruction, extension or structural change, and to any alteration of a building or structure to provide for its use for a purpose or in a manner substantially different from the use to which it was put before alteration, or for its use for the same purpose to a substantially greater extent.
- E. Section 5.04 – Table of Use Regulations
 1. Institutional & Educational ART.2, STM 9/04 (Community Center, youth club. . . or other similar facility operated by an educational, religious or non-profit institution) in R5 requires special permit
 2. Accessory Use ART. 99, ATM/3/85: ART. 2, STM 9/04 (organized afterschool program) in R5 requires special permit
- F. Article 6, Section 6.03c – When a permitted main building to be used as a dwelling is to be located on the same lot with and beside a permitted nonresidential building, required front, side and rear yards shall be provided between each building and assumed lot lines shown upon the building permit application.
- G. Section 6.18 (ART. 15, ATM 5/91) – Setback of Accessory Buildings and Other Structures – In “R” districts, a detached accessory building or structure shall conform to the provisions set forth in the following schedule: R5 requires 20 feet from the front lot line and 6 feet from the side and rear lot lines.
- H. Section 6.00 – Table of Dimensional and Density Regulations: for District R5, Any other permitted principal structure:
 1. Lot Requirements: min 6,000 sf and 60’ of frontage
 2. Floor Area Ratio (FAR): 0.80
 3. Lot Coverage Minimum: NA
 4. Minimum Lot Area per Dwelling Unit: NA
 5. Minimum Front Yard: 20’
 6. Minimum Side Yard: 20’ (except as per Section 5.02; ART. 22, ATM 4/97; and Section 6.26)
 7. Minimum Rear Yard: 20’ (except as per Section 5.02; ART. 22, ATM 4/97; and Section 6.26)
 8. Maximum Height: 3 Stories, 35’
 9. Minimum Open Space: Landscaped 30%, Usable -
- I. Section 5.02 –Permitted Uses
 1. ART.10,ATM 4/98; ART.11,ATM 4/98
In the following Table of Use Regulations, the uses permitted by right in the district shall be designated by the word "yes," except that any use listed in the following Table of Use Regulations as a permitted use, the proposed location of which does not abut on a street which is laid out and approved by the Board of Survey as a traveled way, or which has not been built to subgrade, so that such way or street is passable for fire apparatus and other traffic, or which abuts on a street or way in which there is no public sewer or in which there is no water available for connection with the building after completion, may be allowed only by special permit. Those uses that may be

permitted by special permit in the district, in accordance with Articles 10 and 11, shall be designated by the letters "SP." Uses designated with a blank shall not be permitted in the district.

2. ART. 7, ATM 4/05

A lot or structure located in the R6, R7, B1, B2, B2A, B3, B4, B5, PUD, I, MU, and T districts may contain more than one principal use as listed in Section 5.04 "Table of Use Regulation." For the purposes of interpretation of this Bylaw, the use containing the largest floor area shall be deemed the principal use and all other uses shall be classified as accessory uses. In the case of existing commercial uses, the addition or expansion of residential use within the existing building footprint shall not require adherence to setback regulations for residential uses even if the residential use becomes the principal use of the property.

- J. ART. 22, ATM 4/97 – L is the length of a wall parallel (or within 45 degrees of parallel) to lot line, measured parallel to lot line, subject to the provisions of Section 6.26 for building of uneven alignment or height, H is height of that part of the building for which the setback or yard is to be calculated.

K. Section 6.26 • Buildings of Uneven Height or Alignment

- a. Where a building is not of the same height throughout its length parallel (or within 45 degrees of parallel) to any lot line, but where it is in one alignment along said length, required yards and setbacks shall be either $(H^1 + L^1)/6$ or $(H^2 + L^2)/6$ whichever is greater, where:

H^1 = the height of the taller portion of the building; H^2 = the height of the lower portion of the building;
 L^1 = the length of the taller portion of the building; and
 L^2 = the entire length of the building.

Where the formula 10 + U10 applies, L shall be defined as L^2 above.

- *b. Where a building is of the same height throughout its length parallel (or within 45 degrees of parallel) to any lot line, but where it is not in one alignment along said length, required yards and setbacks shall be $(H + L^1)/6$ for the portion of the building nearer the lot line; and $(H + L^2)/6$ for the portion of the building further from the lot line, where:

H = the height of the building;
 L^1 = the length of the portion of the building nearer the lot line; and
 L^2 = the entire length of the building.

Where the formula 10 + (U10) applies, the required yards and setbacks shall be 10 + $(L^1/10)$ for the portion of the building nearer the lot line; and 10 + $(L^2/10)$ for the portion of the building further from the lot line, with L^1 and L^2 defined as above.

- c. Where a building is not of the same height throughout its length parallel (or within 45 degrees of parallel) to any lot line, and where it is not in one alignment along said length, required yards and setbacks shall be calculated as follows:

- *1. Where the taller part of the building is nearer to the lot line required yards and setbacks shall be $(H^1 + L^1)/6$ for the portion of the building nearer to the lot line; and $(H^2 + L^2)/6$ for the portion of the building further from the lot line, where:

H^1 = the height of the taller part of the building; H^2 = the height of the lower part of the building;
 L^1 = the length of the taller part of the building; and
 L^2 = the entire length of the building.

2. Where the formula $10 + (U/10)$ applies, required yards and setbacks shall be $10 + (L^1/10)$ for the portion of the building nearer the lot line; and $10 + (L^2/10)$ for the portion of the building further from the lot line, with L^1 and L^2 defined as above.

*3. Where the taller part of the building is further from the lot line, required yards and setbacks shall be $(H^1 + L^2)/6$ for the portion of the building further from the lot line; and $(H^2 + L^1)/6$ for the portion of the building nearer the lot line, where:

H^1 = the height of the taller part of the building; H^2 = the height of the lower part of the building;
 L^1 = the length of the lower part of the building; and
 L^2 = the length of the entire building.

Where the formula $10 + (U/10)$ applies, the required yards and setbacks shall be $10 + (L^1/10)$ for the portion of the building nearer the lot line; and $10 + (L^2/10)$ for the portion of the building further from the lot line, with L^1 and L^2 defined as above.

- L. ART. 12, ATM 5/91, paragraph b. Under a special permit, the ZBA, or in cases subject to Section 11.06, the ARB may permit further modifications in the dimensional requirements specified in Article 6 as applied to Uses 2.05 and 2.07 to the extent necessary to allow reasonable development of such a use in general harmony with other uses permitted and as regulated in the vicinity.
- M. Section 11.06 – Environmental Design Review

APPLICABLE DHCD GUIDELINES AND STANDARDS

The Concepts Report included a checklist of applicable DHCD Guidelines and Standards. For Schematic Design the pertinent Sections and Categories are as follows:

- Asbestos Remediation & Lead-painted Materials Removal
- Waste Management (see page 23)
- Demolition
- Rough Carpentry
- Finish Carpentry
- Plastic and Composite Trim
- Building Insulation and Moisture Protection
- Sheet Metal Trim & Flashing
- Doors and Frames
- Entrances and Storefronts
- Door Hardware
- Gypsum
- Specialties (Toilet Accessories, Window Treatment, Entrance Mats)
- Residential Appliances
- Casework
- Fire Suppression – Sprinklers
- Electronic Safety and Security
- Earthwork
- Asphalt Paving
- Site Improvements
- Landscaping
- Site Utilities

The following filed-sub bid categories would be required (work exceeding \$20,000):

- Sealants
- Windows
- Resilient Flooring
- Painting
- Plumbing
- HVAC - Requires 15 CFM of outside air per person to be brought into the building. A normal split system will handle that air load, a roof top unit with a full economizer and power exhaust
- Electrical

Those Sections and Categories dependent on Design Development are as follows:

- Contaminated Site Material Removal
- Structural Steel
- Siding
- Gutters & Downspouts
- Soil Treatment

The filed sub-bid trades are dependent on the extent to which they will be incorporated into Design Development (work exceeding \$20,000):

- Unit Masonry – if salvage existing masonry for re-use.
- Miscellaneous & Ornamental Iron
- Waterproofing & Dampproofing
- Asphalt Roof Shingles
- Membrane Roofing
- Tile – if just the kitchen, food pantry and restrooms were to receive tile (flooring and wet wall tile wainscot), the total area would be less than \$20K. Installing tile in the entrance area(s) would trip the \$20K minimum, thus requiring FSB. If resilient flooring is used in the kitchen and food pantry, the tile FSB might not be needed.
- Elevator

01 74 19 Waste Management

Ongoing building operations



Existing waste management for the administration building is the same as for the residential buildings: residents have their respective trash barrels which they bring out to the curb (Fremont Court or Fremont Street) for regular trash pick-up, or waste is deposited in one of several trash receptacles at the corners or dumpsters that are located at the parking lots. Each residence has a blue recycling bin that is brought out for regular recycling pick-up.

Specifying recycled, reused or repurposed products and materials as appropriate for construction

According to the DHCD Design and Construction Guidelines and Standards (01 74 19), the specifications shall include the following:

- Clear direction to contractor and subcontractors that the waste management plan is mandatory and must comply with all local, state and federal authorities of jurisdiction; include discussion on WMP at the kick-off meeting
- Communication plan outlining how recycling will take place, who is responsible for oversight, acceptable submittal forms, schedule of submittals, expected recycle content and estimated quantities
- Materials and quantities that the contractor will be required to salvage or recycle, including packing materials
 1. Salvage brick from existing admin building for reuse in new building
 2. Salvage rolling door for use in the new building
 3. Separate metals to be recycled (window frames)
 4. Separate wood framing to be recycled
- Procedures for recycling: salvage, on-site reuse, mixed-waste recycling, etc.
- List of recycling facilities and contact information
- Reporting protocol for waste materials and ACM and lead-painted materials removed from the project
- Method for receiving authorization for alternative means of disposal
- Clearly marked construction bins, dumpsters, etc. to avoid mixed waste contamination; should include Directions to lock dumpsters after hours of operation

APPENDICES

Arlington Housing Authority
New Life & Skills Center at Menotomy Manor
Fremont Court

Concepts Submission
November 11, 2015 [\(rev. 12/24/15\)](#)

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EXISTING CONDITIONS REVIEW

Bid Docs Online scanned the drawings, specifications and other documents (for Hauser Apartment Building, Menotomy Manor, and other Arlington Housing Authority properties) that had been stored in Hauser. After they were scanned, the original hard copies were retained by Roland Demers, the Superintendent of Maintenance, and are stored in the second floor storage room.

Although the Menotomy drawings from 2007 kitchen/bath renovations were listed on BDO, they were not accessible. At the kick-off meeting, Bob Cronin said that the original Menotomy Manor building drawings might be in the attic of the administration building. On November 5th, a search in the attic was not fruitful, but drawings were found in the basement of Cusack Terrace and at the 2nd floor storage room of Hauser.

The 2007 kitchen and bath renovation drawings were found but do not contain a site survey. The 1949 drawings were found, including the original site survey with soil boring data. For the design of the New Life & Skills Center, a current site survey will be needed and soil tests.

The first week of visits included the following:

October 27th - Menotomy Manor Administration Building, 45 & 80 Fremont Court
October 28th - Menotomy Manor Site
November 5th - Menotomy Manor Site and Administration Building Attic

EVALUATION OF EXISTING ADMINISTRATION BUILDING

1. The Site

- a. Menotomy Manor family development is composed of three parcels of land: two of the parcels (with twelve wood-framed residences on the upper parcel and thirteen wood-framed residences on the lower parcel) are bounded by Gardner Street on the west, Sunnyside Avenue on the north and east, and Fremont Street on the south; Memorial Way separates these two parcels from each other; the third and main parcel, bounded by non-AHA properties on the west and north, Fremont Street on the south, and Gardner on the east, includes twenty-one two-story brick residential buildings plus the administration building centrally located on the site. The buildings were constructed in the 1940's, with a 2007 renovation of kitchens and baths but otherwise no major renovations.
- b. An internal driveway, called Fremont Court, enters the parcel off of Fremont Street and circles around the admin building and two of the residential buildings. There are small parking lots distributed around the site, and parking on Fremont Street and Gardner Street. Parking is prohibited along Fremont Court as it serves as the fire lane.
- c. Although the Mystic River is a couple of blocks north of it, the site, according to the Arlington Zoning Map, is not in the flood zone. Only the building (called #4 by AHA) located at the northern edge of the third parcel at Gardner Street has a history of water infiltration at the foundation.

2. The Administration Building

- a. The existing administration building is a gable-roofed, one-story, masonry structure with a basement. Given the exterior wall thickness, the stud back-up is probably 2x4. The overall

dimensions are approximately 36'-0"W x 23'-0" deep. The entry is up a few steps to a central door. When facing the front of the building, on the left side of the first floor is a service counter and desk for the police substation, the property manager's office, and one restroom. The floor to ceiling in the office area is about 8'-0", and about 8'-8" in the maintenance area.

- b. The main office area was packed with two refrigerators behind the desk, two leather club chairs, a table loaded with boxes of produce, shelving and a cold water dispenser.
- c. On the right side of the first floor is the maintenance shop which houses a work bench, tools, ladders, and stock materials. The maintenance shop can be accessed three ways: interior door from the office area and one step down, door on the right of the building to the exterior and two steps down, and a rolling door at the rear that ramps down via an asphalt surface to grade.
- d. The basement is accessed by wooden stairs from the maintenance area and is used primarily for storage. The basement floor to ceiling height is less than 7'-6". A gas meter is at the northwest corner, a slop sink located just past the base of the stairs, boiler and water heater next to the stairs. There did not appear to be a floor drain in the basement. A structural beam is aligned under the wall that separates the office area from the maintenance room. There are some jack studs adjacent to the structural beam, and Roland Demers explained that they had been centered under the maintenance room when the floor began to sag after the bobcat was stored in there. The concrete foundation was probably designed for a one-story structure, most likely not reinforced. The floor joists are covered but probably no more than 2x10s given the span between the central beam and the foundation walls.
- e. A larger bobcat is parked outside to the left of the building. Roland reported that the basement was once accessible by an external ramp (at the left side of the building) down which the equipment could be rolled into the basement for storage. The existing area of the parking lot to the left of the building does not appear to have enough length for a properly sloped ramp. One car was parked next to the bobcat, and no more than two cars were parked on the lot to the right of the building.
- f. Behind the admin building is a storage container that is approximately 6'-0"W x 12'-0" that houses lawn care equipment, snow blower, etc.

3. Operation Success and Boys' and Girls' Club

- a. Two after-school programs are currently housed in two separate townhouses (45 and 80 Fremont Court). Each of the townhouses has three bedrooms, kitchen, bathroom, and a basement. Neither program appears to use the basements, and the kitchens used mainly for storing snacks.
- b. The bedrooms in the Operation Success townhouse are used for computers and are locked when not in use. The living room has narrow tables for individual study.
- c. The bedrooms in the townhouse used by the Boys' and Girls' Club are sparsely furnished and mainly store toys and games. The living room has larger tables for group activities, and a whiteboard sits on the floor.

ASSESSMENT OF CODES AND REGULATIONS

Current codes -

IBC 2009 Residential Group R-2, Type IIIA Construction
NEC
ASHRAE
NFPA 14

Exterior and Interior Accessibility
ADA
MAAB - Group 2B
UFAS
504

International Energy Conservation Code (IECC) 2009
Stretch Energy Code (The Stretch Code was adopted by Arlington on April 28, 2010 and effective on July 1, 2011.)

Arlington Zoning Bylaws

According to the Town of Arlington zoning map, Menotomy Manor is located in an R5 Apartments Low Density zone.

Relevant Zoning Bylaws affecting Menotomy Manor

Because the New Life & Skills Center would require either an alternation or extension to the existing administration building, then the Bylaws are applicable, as stated below (underlined for emphasis):

Section 4.03 - Existing Buildings and Land

ART. 3, ATM 4/89

This Bylaw shall not apply to existing buildings or structures, nor to the existing use of any building or structure or of land, to the extent to which it is legally used at the time of adoption of this Bylaw, but it shall apply to any change of use thereof and to any alteration of a building or structure when the same would amount to reconstruction, extension or structural change, and to any alteration of a building or structure to provide for its use for a purpose or in a manner substantially different from the use to which it was put before alteration, or for its use for the same purpose to a substantially greater extent.

Allowable uses in R-5

Accessory use
8.08 organized afterschool program. . . providing day care for no more than six children at one time

Arlington Housing Authority
New Life & Skills Center at Menotomy Manor
Fremont Court

Concepts Submission
November 11, 2015 (rev. 12/24/15)

Requires special review

Institutional & Educational
2.01 Community Center, youth club, adult education center. . . operated by an educational, religious or non-profit institution

Section 6 Table of Dimensional and Density Regulations for R5 (permitted principal structure other than residential)

Lot Requirement: 6000 SF min.
Frontage: 60'
FAR: .80
Lot Coverage Maximum Percent: NA
Minimum Lot Area per Dwelling Unit: NA
Min. Front Yard Setback: 20'
Min. Side Yard Setback: 20'
Min. Rear Yard Setback: 20'
Maximum Height: 3 stories, 35'
Landscaped Open Space Minimum 30% of gross floor area

Section 6.18 - Set back of Accessory Buildings and Other Structures

In "R" districts, a detached accessory building or structure shall conform to provisions set forth in the following schedule: R5

Front Setback: 20'
Side and Rear Setback: 6'

Article 8 Parking

8.01 Off-street Parking
...[O]ff-street parking space shall be provided for every new structure, the enlargement of an existing structure, the development of a new land use or any change in an existing use in its entirety in accordance with the Table of Use Regulations (see Article 5), the Table of Off-Street Parking Regulations, and the other requirements contained herein.

ART. 70, ATM 3/77

Use: Community facility - One per each three employees on the largest shift

8.02 Off-Street Loading and Unloading Requirements

ART. 101, ATM 3/87

Use 3. Institutional & Educational, Public, Recreational, & Entertainment, Office
5,000 - 20,000 GSF = 1
20,001 - 50,000 GSF = 2
50,001 - 100,000 GSF = 3
plus one for each 100,000 (or fraction) over 100,000

Section 8.03 Existing Spaces

"shall not be decreased or in any way removed from service to the use originally intended to be served so long as said use remains, unless a number of parking or loading spaces is constructed elsewhere on property under same ownership

Section 8.05 Combined Facilities

Arlington Housing Authority

Concepts Submission

| New Life & Skills Center at Menotomy Manor

November 11, 2015 [\(rev. 12/24/15\)](#)

Fremont Court

Parking required for two or more buildings or uses may be provided in combined facilities on the same or adjacent lots, by special permit from the ZBA, or in cases subject to Section 11.06 [Environmental Design Review], the ARB where it is evident that such facilities will continue to be available for several buildings or uses.

Section 9.10 Special Permit Uses: Repair, Reconstruction, Extension, Addition

Zoning Bylaw Sections to keep in mind during Schematic Design and Design Development:

6.26 Buildings of Uneven Height or Alignment

Article 7 Signs

8.10 Pavement of Parking Spaces

8.12 Parking and Loading Space Standards

8.13 Bicycle Parking

Article 10 Administration and Enforcement

11.06 Environmental Design Review

DESIGN APPROACH AND PRELIMINARY PROGRAM & SCOPE OF WORK

I. As discussed in the kick-off meeting, the project goals and general scope described in both RFS's exceed the available budget. In the descriptions that follow, EHA has attempted to include all observations that pertain to the options of expanding the administration building or creating a new building to house the Life & Skills Center at Menotomy Manor. During Schematic Design EHA will produce a priority list that includes a cost estimate, and options for phasing all or some of the RFS goals, as well as the life-safety, code and health considerations. With the given budgets, the project can be defined from the menu of options from the full spectrum to specific parts.

A. The Request for Architectural Services lists Project Goals and General Scope:

1. Define space and technical requirements for the various programs under consideration
2. Evaluate the suitability of the existing administration building for proposed expansion
3. Identify appropriate sites within the boundaries of the Menotomy Manor development for future satellite facilities
4. Develop a design, either for the existing administrative building or a new building at one of the satellite sites, to the Schematic level that meets the programmatic objectives of the AHA and is within the stipulated budget

B. Program space and technical requirements

At a meeting with John Griffin on August 19th and at the kick-off meeting on October 28th, the list of programmatic spaces that were mentioned include the following: Property Manager's office, police substation, food pantry, Operation Success, Boys and Girls Club, gathering area / speaking room, women's restroom, men's restroom, maintenance, parking & storage for maintenance vehicles and equipment, plus the building's mechanical, electrical, and circulation spaces.

Program	Existing Space (SF)	Proposed Space (SF)	Comments
Property Manager	110	120	Desk, chairs, small meeting table
Police substation	190	120	Desk, chairs, service counter
Food Pantry		150	The food pantry has two refrigerators that are in the same space as the police substation (could be re-used and placed in the proposed kitchen, or replaced by one large commercial refrigerator).
Operation Success	1000	300-500 500	Includes bathroom, kitchen (seldom used), three locked rooms for computers, and open area for study: <u>proposed will have two lockable offices and other open areas shared with other building programs</u>
Boys' & Girls' Club	1000	300-500 50	Includes bathroom, kitchen (seldom used) and open areas for play and for arts & crafts: <u>proposed to have 50 sf of designated storage space and will otherwise share most of the open areas with other building programs</u>
Kitchen	0 (in the existing Admin Building)	250-300 200	There could be one large commercial refrigerator designated for the food pantry; plus a smaller residential refrigerator/freezer for staff and after-school program, warming oven and range hood, commercial dishwasher,

			double-bowl sink with disposal, and counter space, maybe an island to serve the staff and development/community meetings or events needs. As a point of comparison, the Hauser community kitchen is about 320 sf and it is a warming kitchen as well as a distribution center for meal programs. <u>Keep separate from food pantry/distribution; should also be fully accessible but not commercial kitchen</u>
Gathering area / speaking room (should be able to subdivide into smaller rooms that can be used by the after-school programs)	0	3000 5000 <u>1000</u>	With 175 2- and 3-bedroom units at the development, a large gathering space could easily reach 5000 square feet or more. (As a point of comparison, the Hauser community room is about 2600 sf and serves the 144-apartments as well as the rest of Drake Village). And if the Menotomy Manor gathering space is open for the larger community, the area needed could be double that. There would be a need for stackable and/or folding chairs and possibly folding tables, and a room to store them. <u>AHA said most gatherings average 25 people, after-school programs average 15 kids</u>
Maintenance	400 + 550	500	Work benches, power tools, shelving, stock materials Half the basement is storage 400 sf, plus a storage container behind the building is about 150 sf. <u>The staff would like a break space, separate restroom (for some of the community service workers); lawn and snowblowing equipment usually switched out with the end of the season to central garage storage at Hauser site, so some kind of outdoor accessed storage closet to accommodate three lawnmowers and three snowblowers during the appropriate season.</u>
Women's room		450-200 <u>150</u>	The minimum required per plumbing code depends on the occupancy type. If Assembly, need 1 per 150 occupants. [Also required plumbing elsewhere in the building are one drinking fountain and one service sink]. If we assume Assembly with a maximum occupancy load of 350 (or 175 apartments x 2 persons), then 2 WC for men and 3 WC for women, and 1 lav each. <u>according to the IEBC, the use group is Business, and the CMR 248 Uniform State Plumbing Code calls for - 1 toilet per 25 females; 33% lav; 1 service sink per floor; 1 drinking fountain per floor</u>
Men's room		440-125 <u>100</u>	Same as above, plus the International Plumbing Code allows urinals as substitute for toilets, again dependent on occupancy type: substitute 1 in Educational and Assembly 419.2 Substitution for water closets. In each bathroom or toilet room, urinals shall not be substituted for more than 67 percent of the required water closets in assembly and educational occupancies. Urinals shall not be substituted for more than 50 percent of the required water closets in all other occupancies. <u>according to the IEBC, the</u>

			<u>use group is Business, and the CMR 248 Uniform State Plumbing Code calls for 1 toilet per 20 males; 33% lav; service sink and drinking fountain counted under Women's room</u>
Unisex restroom	40	90	Currently only one restroom and it does not meet MAAB. One accessible restroom should be available for any persons who may be transitioning.
Mechanical room	50	120	Slop sink, boiler and storage tank in basement currently
Electrical room	0	120	No separate room currently: <u>will house electrical, fire alarm control equipment, telecom and security camera hard drive cabinet.</u>
INTERIOR SUBTOTAL	3390	5330-7515 <u>3220</u>	<u>If Maintenance, Unisex Restroom, Mechanical, Electrical (totaling 830 sf plus circulation) are in basement, the main floor would total 2390 sf plus circulation.</u>
Circulation - excluding elevator related	60 sf	800-1130 <u>800</u>	Currently minimal hallway between restroom and maintenance, and stair to basement, but calculate 4525 % of total SF for proposed
Circulation - Elevator or lift related		1150-1400 <u>392-588</u>	200-96 SF per floor for hoistway, 400-100 SF for the machine room, plus 90 SF for lobby per floor <u>(this would be part of the general circulation square footage).</u> Range from two to three floors plus basement.
<u>Circulation – lift related</u>		<u>50-100</u>	<u>Need variance if split and have two lift areas: one to basement and one to upper floor (assuming basement plus 1st and 2nd floors)</u>
INTERIOR PLUS CIRCULATION TOTAL	3450	7280-10,042 <u>4020 excl elevator; 4070-4120 incl. lift; or 4412-4608, incl. elev.</u>	Assuming equal sized floors: 1820-2510 SF per floor on three floors, plus basement; 2425-3347 SF per floor on two floors, plus basement
Parking to be replaced if use existing Admin Bldg location	2240	1000-2600	Currently eight parking spots next to the Admin Bldg., but need at least five spots for administrative and maintenance staff and one for the bobcat. Zoning calculation would require 3 parking spots plus one designated for HC.
Parking to be replaced if use one of the two larger parking lots on site	3360-4560	3360-4560	The two larger parking lots on the site contain 16 and 22 spaces

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C. Possible locations at the development site for a new building

1. Expanding Existing Administration Building to House All Programmatic Needs
 - a. Advantages
 - i. maintain central, prominent location of the building

- ii. existing afterschool programs can continue during construction
- iii. lose minimum number of parking spaces
- b. Disadvantages
 - i. property manager, police substation and maintenance will have to be relocated temporarily
 - ii. limited footprint size because of curb, driveway and adjacent residential buildings
 - iii. existing admin building foundation will have to be enhanced to carry a second or third floor

2. Razing the Existing Administration Building and Constructing New Building to House All Programmatic Needs

- a. Advantages
 - i. maintain central, prominent location of the building
 - ii. existing afterschool programs can continue during construction
 - iii. lose minimum number of parking spaces
- b. Disadvantages
 - i. property manager, police substation and maintenance will have to be relocated temporarily
 - ii. limited footprint size because of curb, driveway and adjacent residential buildings

3. Constructing a New Building at One of the Two Larger Parking Lots on the Site

- a. Advantages
 - i. admin and other programs can continue during that construction until the new building is constructed
 - ii. footprint could be larger than where current admin building is
- b. Disadvantages
 - i. new building would be less prominent location than where current admin building is
 - ii. to maintain quantity of parking, current admin building would be razed to make room for the relocated parking
 - iii. parking would be the central focus when arrive at Fremont Court driveway (landscaping and plantings could provide a screen and nicer welcome to the site)

4. Divide programs into two smaller buildings:

- renovating and expanding existing admin building to house police substation and maintenance,
- constructing new building to house property manager's office, after school programs, and larger gathering space.
- a. Advantages
 - i. if new smaller building started, for example in one of the parking lots, then admin and after school programs can continue during that construction until the new building is constructed
 - ii. renovation of the existing building can be phased: adding a larger maintenance area while maintaining the police substation, and once the addition is constructed, the existing office area can be updated.
- b. Disadvantages
 - i. two construction projects
 - ii. will need to maintain two buildings instead of one
 - iii. lost parking (would need zoning relief)

E. Considerations for Schematic Design and Design Development

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1. site work, soil, and utilities (including utility pole behind admin building)
2. accessibility elevator or lift
3. overhead garage door for maintenance equipment storage, accessible at grade
4. aesthetics/style of the building

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The following table, organized by specification sections, compares the RFS goals and general scope of work with other considerations as found during the site visits and as discussed at the kick-off meeting.

Division	RFQ Scope	DHCD Requirements	Other Considerations	Priority
2 - Site	Earthwork, excavation, grading, paving			
	Site Utilities			
	Landscaping			
3 - Concrete	Foundation			
	Walkway, paving			
4 - Masonry	Envelope (to be determined)			
5 - Metals	Structural			
6A - Rough Carpentry	Framing & blocking			
6B - Finish Carpentry	Related to windows, doors, details			
7 - Cladding & Waterproofing	New envelope including walls and roofing			
	Patching or repairing of existing envelope (if current admin building is not razed)			
	Insulation			
8 - Windows	Replacement and new			
	Windows/Storefronts			
8 - Doors & Hardware	Exterior and interior			
9 - Finishes	Gypsum wall board, metal studs			
	Resilient and ceramic tile			
	Paint			
10 - Accessories	Bathroom accessories, including grab bars			
	Signage			
	Entry mats			
11 - Appliances	Range, refrigerator, dishwasher, range hood, disposal	DHCD requires all appliances be EnergyStar		

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12 - casework	Kitchen & any other built in service counters or work spaces			
13 - Trash Compaction			Trash compactor for maintenance area?	
13- Security	Tie in with existing			
14 - Elevator or lift	To be determined			
15A - Plumbing	new energy efficient fixtures (kitchen sink, faucets, lavatories, toilets).			
	Roof drains, floor drains			
15B - Fire Protection (sprinkler)	Meet IBC and Plumbing Code			
15C - HVAC	Building heating & air conditioning			
	Building Ventilation			
	Mechanical & maintenance area ventilation			
	Range hood venting, bath ventilation			
16A - Electrical				
		DHCD requires rough wiring for power operated doors at exterior entries		
		DHCD requires motion sensor lighting at all interior common areas and at exterior entry doors		
		DHCD requires that overhead light fixtures be able to accommodate 2700-lumen lamps		
		DHCD requires dimmable kitchen counter & vanity lights		
	LED lighting at kitchens & baths			
16B - Fire Alarm	Addressable			

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RECOMMENDATIONS FOR FOLLOW-UP INVESTIGATION & RESEARCH

While EHA continues to review existing conditions, drawings and other documents, and begins work on schematic design, we recommend the following:

Although a 1949 survey with soil boring data was found in the Hauser storage room, it reflects the site prior to any construction. If recent survey is unavailable, EHA recommends arranging a survey of site including soil testing to determine whether the building 4 water infiltration is an anomaly.



DIVISION 0 SUMMARY:

The Project at 100 Fremont Court includes demolition of the existing administrative building and construction of new Life & Skills Center for use by the residents of the Menotomy Manor Family Development 200-1, 200-2. The program includes the manager's office, maintenance, a police substation, after-school programs, flexible/gathering room, small meeting room, kitchen, food pantry, restrooms, mechanical and electrical rooms.

DIVISION 1 GENERAL REQUIREMENTS:

- I. DOCUMENTS: Except where authorized exceptions have been made due to un-changeable existing conditions, the plans, details, and specifications for the project are designed to meet or exceed the requirements of the Massachusetts State Building Code.
 - II. LOCAL CONDITIONS: The Architect must be apprised of any local conditions or requirements that require modifications to the plans, details and specifications.
 - III. DESIGN CRITERIA for this project are as follows:
 - A. Seismic Load: $S_s = 0.29$ $S_i = 0.068$
 - B. Wind Load: 105 MPH
 - C. Live Loads:
 1. Kitchen/Living Room/Dining Room 40 psf
 2. Sleeping 40 psf
 3. Ground Snow 45 psf
 4. Attic 30 psf
 5. Exterior Decks 60 psf
- A. Scope:
1. It is the responsibility of the General Contractor to inspect the building site to familiarize himself and/or herself with all existing site conditions. Failure to do so will not be accepted as a basis for claims or related Change Orders during the progress of the work.
 2. All work and materials shall conform to the current requirements of the International Existing Building Code, Massachusetts State Building Code, and all other applicable local, state and federal Codes and Ordinances –latest edition.
 3. The Contractor shall provide all labor, materials, and incidentals necessary to provide the Owner with a 100% complete project except for work or materials that is excluded as being by Owner.
 4. The Contractor shall secure and pay for all permits, fees, and licenses necessary to do the work except as noted as otherwise.
 5. The Contractor shall coordinate work of all trades.
 6. The Contractor shall provide a staging plan in cooperation with the Owner.
 7. The Contractor shall provide temporary facilities and utilities.
 8. The Contractor is responsible for securing the site and for the costs of any on site vandalism or theft at all times during the construction contract.
 9. Integrated Pest Management to include at a minimum:
 - a. Preventing rodent access through holes in exterior and foundations
 - b. Use appropriate materials: steel wool, sealants, and boric acid
 - c. Seal all exposed vertical and horizontal holes in walls and floors.
 10. The Contractor is responsible for construction waste management program that shall divert 75% by value of all construction waste from landfills.
 11. The Contractor is responsible for verifying all dimensions in the field before ordering any materials or fabricating items.

12. The Contractor is responsible for obtaining approval from the Owner for substitutions of equal products and/or deviations from drawings.
13. The Contractor shall, with the Architect, conduct weekly job meetings at the site, or as deemed required, and will include representatives of the sub contractors at such meetings whenever necessary.
14. The Contractor will need to provide invoices and labor costs to the Owner who shall apply for EnergyStar and various utility rebates for lighting fixtures, appliances, heating equipment, windows, and any other energy saving improvements wherever eligible. Submittals to the Architect shall include all information required to verify LEED for Homes requirements are met.
15. On site wages shall be governed by Davis-Bacon prevailing wages rules. Contract shall be governed by the Davis-Bacon Act prevailing wages in place at the time of the contract signing. Current DBA wage determinations by County in Massachusetts may be found at <http://www.gpo.gov/davisbacon/ma.html>.

B. Alternates

1. Metal Roof – Berridge or equal.

DIVISION 2A SITE WORK

- I. ALL SITE WORK is the responsibility of the General Contractor as well as the protection of existing and neighboring properties.

II. LANDSCAPE

A. Scope

1. New plantings at parking areas to serve as screen for the residential buildings.
2. Protection of existing trees during construction.
3. Clean up and maintenance of site.
4. Walkway and curb areas, refer to Division 3 Concrete.

DIVISION 2B DEMOLITION

ALL DEMOLITION WORK and engineering is the responsibility of the General Contractor. The demolition work includes but is not limited to the items below to achieve a finished project.

A. Scope

1. Waste management plan diverting 75% from disposal stream.
2. Demo and cap utility lines; make safe. See Divisions related to HVAC, Plumbing, Electrical
3. Protect adjacent residential buildings.
4. Salvage existing brick and existing rolling door
5. Coordinate demolition with asbestos abatement.
6. Coordinate disposal of lead-painted materials.

DIVISION 3 CONCRETE A.

Scope:

1. Repair of walkways in courtyard and north yard between residential buildings.
2. New concrete sidewalks at the southwest, south and southeast perimeter of the "island".
3. New walkways to the new building as shown on the proposed site plan.
4. New reinforced concrete foundation walls and reinforced concrete floor slab.

B. Materials:

1. 3000 psi at walkways, broom finish. WWM min. 1" coverage.
2. 4000 psi at walls, exterior stairs & slab; rebar per detail drawings.

DIVISION 4 MASONRY

A. Scope: Install brick veneer using salvaged and new brick as shown on elevation drawings.

1. Include proper back-up ties, weep holes,
3. Pointing with Type N mortar
4. Expansion and control joints.

B. Materials:

1. Submit for approval bricks and mortar that closely match the appearance of the existing salvaged brick.
2. Brick Vents for kitchen range hood ventilation.

DIVISION 5 METALS

I. ALL NAILS, SCREWS, BOLTS and other fasteners required for the installation of the building materials are to be included by the Contractor in each section of the work. Provide any steel reinforcing required for the foundations or masonry opening lintels.

A. Scope

1. Structural angles, anchor bolts, and related steel attachment accessories.
2. 3" metal decking
3. Masonry lintel for new overhead door and framing at openings greater than 6'-0"
4. Bearing plates
5. Light gauge steel (or wood--see divisions 6 & 9) framing for non-load bearing interior partitions.
6. Interior stair rails per plans

B. Materials.

1. Structural Steel shall be designed and fabricated in accordance w/ structural specifications of certified construction documents. Steel shall be specified with 80% recycled content.
2. 3" galvanized steel decking and fasteners
3. Anchor bolts and accessories for attachment of steel shall be designed and installed per
4. ASTM specifications.
5. A36 Hot dipped galvanized steel plates for new decking connections
6. Steel studs for the framing of non-load bearing partitions will be no thinner than 22 gauge, spaced at 16" o.c., and conform to ASTM A-653, A-924, A-568. Installation per ASTM C 754 & C-1002.
7. 1-1/4" outside diameter Galvalume-finished pipe rails at stairs.
8. See Flashing materials in Division 7.

DIVISION 6 WOOD AND PLASTICS

A. Scope: as required per plans

1. New framing (wood or metal - see division 5 for metal and division 9 for finishes)
2. Floor joists
3. Blocking for handrails, grab bars, and bathroom accessories and strapping as required for cabinets, counters, grab bars, etc.
4. Rough carpentry related to roofing

5. Rough carpentry related to fire protection, mechanical, heating/cooling, ventilation, electrical and fire alarm work.

B. Materials:

1. All Lumber: kiln dried, kept dry, moisture content of 19% or less, warp-free, except PPT that should be used as soon after treatment as possible.
2. Framing Lumber: No. 2 grade, seasoned (SPF) Hemlock Spruce, or Fir for studs, nailers, blocking and bridging per certified structural specifications.
3. No tropical woods shall be used.
4. Composite woods shall be low formaldehyde or No added urea formaldehyde (NAUF).
5. Plastic Laminate: Kitchen countertops shall be exterior or marine plywood substrate. WilsonArt, Plastic Laminate or equal. Plastic laminate backsplash.
6. Interior door & window casing: 3-1/2" "Stafford" style pine door casing paint grade pine, 3/4" MDO sill with Brosco #8645 painted-Pine window aprons.
7. Interior wall base: 3/4" x 5-1/2" wood speed base (paint grade).

DIVISION 7 THERMAL AND MOISTURE PROTECTION

A. Scope

1. Head, Jamb, and Sill Flashing: exterior windows and doors.
2. New tapered roof insulation, including recovery board. See Alternates Division 1.
3. New membrane roof, per plans. See Alternates Division 2.
4. New asphalt shingle roofing, per plan.
5. Fiber cement siding
6. New batt insulation where exterior walls opened up.
7. New rigid insulation at walls and roof
8. Select interior insulation for sound proofing.
9. Spray foam insulation at exterior cavities.
10. Flashing and sealants (urethanes and commercial grade silicones only).
11. Must pass EnergyStar Thermal Bypass Inspection Checklist. Contractor to notify Owner and Architect when envelope and HVAC related work is complete in order to perform the necessary testing (window air and water infiltration; blower door).
12. Emergency over flow roof scuppers. Relief scuppers are needed on the roofs with full perimeter parapets.

B. Materials

1. Head, jamb, and sill flashing new exterior doors: .019 aluminum Z-Flash with factory applied finish coating.
2. At exterior walls 1 1/2" polyisocyanurate rigid or composite polyiso insulation board (Firestone or equal) attached to stud walls with manufacturer-recommended fasteners.
3. All Flashing: minimum .019 aluminum with factory applied finish coating
4. Exterior & interior wall penetrations: spray foam polyurethane gap sealer.
5. Air Tightness: Air leakage ratio of maximum 3 ACH 50 Pascal for building to exterior and 7 ACH 50 Pascal for units to units. Special attention shall be paid to the sealing of shafts and demising walls.
6. Sealants and draft stop material applied per manufacturer's instructions: urethanes and commercial grade silicones: Sika-flex, Tremco, etc. All sealants shall be low VOC meeting South Coast Air Quality Management requirements.
7. Roofing by Carlisle, Firestone or equal. EPDM membrane to be light-colored; provide and install all related materials and accessories including roof drains (coordinate with Plumbing), cant strips, flashing, termination bars, stops, bonding adhesive, splicing cement, lap sealant, etc. Fifteen-year warranty of materials and labor.
8. Asphalt shingles by CertainTeed or equal. 20-year warranty.
9. Fiber cement siding by Hardie or equal.

DIVISION 8 DOORS AND WINDOWS

A. Scope

1. Thermally broken aluminum frame windows throughout building.
2. Aluminum storefront as shown on drawings.
3. Salvaged rolling door at maintenance.
4. Interior Unit and Closet Doors.
5. Door and Window Hardware, thresholds, and weather stripping.
6. Windows at the second floor to be equipped with opening-limiting mechanism.
7. Paddle-operated automatic door opener, meeting ADA requirements, at front and rear lobby doors. Coordinate with Division 16A Electrical.
9. Must pass EnergyStar Thermal Bypass Inspection Checklist. Contractor to notify Owner and Architect when envelope and HVAC related work is complete in order to perform the necessary testing (window air and water infiltration; blower door).
10. Locks and keying to be coordinated with and reviewed by Owner.

B. Materials

1. Windows to be fiberglass, double-glazed, argon-filled, low-e coated, by Pella, Marvin, or equal. Glazing to be U-.32 with SHGC greater than or equal to .40.
2. Aluminum commercial storefront by Kawneer or equal.
3. All windows above the first floor shall be provided with limiting hardware. Keyed slide bar locks to limit window travel. Key per Owner specifications.
4. Aluminum extrusion frame shall be of a color selected by the Architect from the screen manufacturer's line of standard, custom, and premium colors. Wire screen fabric shall be 12-mesh .028 charcoal stainless steel.
5. Exterior Secondary Door: 16 gauge factory finished, galvanized steel flush door, with polyisocyanurate core and 5" x 20" vision panel. Frame to be 14-gauge, galvanized steel with factory finish.
6. No tropical woods or tropical veneers shall be used.
7. Door Hardware (All exterior doors require new door lock hardware)
 - a. Exterior Entry Doors: Grade-1, Corbin-Russwin ML 2200 series mortised, 2-3/4" backset hardware locksets, and electric strikes tied to the intercom system, aluminum and hardwood adjustable thresholds, weather stripping, ball bearing hinges, panic device, and door closer.
 - b. Corbin-Russwin CL 3900 series throughout, Master keyed with interchangeable cores, "Satin Chrome" finish, and "Princeton" lever style
 - c. Door stops (at all doors) to be wall-mounted or floor-mounted where possible. No hinge mounted door stops will be accepted.

DIVISION 9 FINISHES

A. Scope

1. Gypsum Board: 5/8" type-x gypsum wallboard. Areas of ceiling to be smooth taped with a smooth finish. Light-gauge steel (or wood--see divisions 6 & 9) framing for non-load bearing interior partitions, soffits, and chases. This shall include light gauge steel studs, and light-gauge steel channels with metal ties to ceiling above as bracing or support as required.
2. Densglas 5/8" board at basement walls.
3. Cementitious backer board at tiled wall surfaces and behind the counter of the kitchen sink.
4. Ceramic Tile
 - a. 2" x 2" at restroom floors
 - b. 4" x 4" for wainscot at wet wall of restrooms

5. Resilient Tile 12" x 12" (kitchen, food pantry, flex/gathering, maintenance, electrical room)
6. Resilient Tile - strips with wood finish (offices, meeting room, Operation Success)
7. Closet flooring to match flooring of room.
8. Rubber treads and risers at stairs; and skirt to be painted wood. Risers to be in color contrasting from the treads.
9. Painting.

B. Materials

1. GWB shall be 80% or better recycled content: 5/8", Firecode 'Type X', mold resistant in areas without tile in full bathrooms (drywall shall be paperless). Cement-based backer board at tiled surfaces.
2. Ceramic tile: American Olean or equal: Ceramic wall tile for tub surrounds and unglazed porcelain for bathroom floors. Grout shall be sealed with low VOC sealant.
3. "Wood" Strip Resilient Flooring: Decoria Narrow Planks in Fine Grain finish selection, or equal.
4. 12x12 Resilient Flooring: Marmoleum or equal.
5. Rubber treads on low-rise internal apartment stairs: Johnsonite or other approved by architect.
6. Apply paint in a professional manner where all lumps and voids are eliminated prior to final coat. Paint to be "brush applied" to all woodwork, door slabs, and ironwork.
7. Painting Interior (low or no VOC's), Sherwin Williams or equal: meeting GreenSeal Standards, GS-11:
 - a. Ceilings: 1 coat latex primer, 1 coat flat ceiling paint.
 - b. Walls: 1 coat latex primer, 2 coats latex egg shell.
 - c. Bathrooms: 1 coat latex primer, 2 coats semi-gloss enamel.
 - d. Woodwork: 1 coat enamel undercoat, 2 coats semi-gloss enamel.
 - e. Ferrous metal: 1 coat rust-inhibiting primer, 1 coat enamel undercoat and 1 coat semi-gloss alkyd enamel. (This includes the malleable iron gas pipe and fittings between the meter and the foundation).
8. All adhesives shall be low- or no-VOC.

DIVISION 10 SPECIALTIES A.

Scope

1. Restrooms shall have toilet partitions, toilet paper holder, sanitary product dispenser, soap dispenser, mirrors, robe hook, baby-changing station, and paper towel/trash receptacle.
2. Street Address Building Number.
3. Signage: way-finding, room-identifying signage, stair emergency egress maps at each landing
4. Fire extinguishers in cabinets (one per floor)
5. Recessed floor entry mats.
6. Limiting Hardware (see Division 8).

B. Materials

1. Toilet Accessories: stainless steel or brushed nickel finish toilet paper holder, sanitary product dispenser, soap dispenser, mirrors, robe hook, and paper towel/trash receptacle by Hallmack, Nutone, Basco, or equal.
2. Toilet Partitions by Bobrick or equal.
3. Baby-changing station wall-mounted, fold-down by Koala or equal.
4. Street Address Building Number(s) Brushed nickel, 4" high, surface-mounted.
5. Signage to meet ADA/MAAB requirements.
6. Recessed mats: Mats Inc. Dri Track or equal.

DIVISION 11 EQUIPMENT

A. Scope

1. Residential appliances: 30" electric range and hood (over-the-range exhaust fan vented to the

- exterior), wall oven & cook top, two refrigerators, dishwasher.
2. All appliances to be EnergyStar certified.

B. Materials - Note: Appliances should be EnergyStar rated where applicable.

1. Range: 30" electric cook top and self-cleaning oven. Cook top and wall oven to meet MAAB. One-year parts and labor warranty.
2. Range hood by Broan Allure I, GE or equal: 30" ducted to the exterior, quiet operation rated at 2 sones or less, with two speed fan, and two light settings using compact fluorescent bulbs. At HC units, hood fan/light shall be switched at front of counter -- see Division 16 Electrical. One-year parts and labor warranty.
3. Refrigerators: 20-cu ft. min. side-by-side refrigerator-freezer or bottom-mounted freezer One-year parts and labor warranty.
4. Dishwashers: 24" front control by GE, Maytag or equal with front push button controls to meet MAAB. One-year parts and labor warranty.

DIVISION 12 FURNISHINGS

A. Scope

1. Kitchen cabinet casework
2. Plastic laminated countertops, backsplash, and backsplash at range.
3. Window shades
4. Wire shelving at closets.

B. Materials

1. Kitchen cabinets: Frames to be made with formaldehyde-free plywood with plastic laminate surfaces.
2. Kitchen Counter: high pressure, .050 thick, 1 piece (post-formed) plastic laminate, WilsonArt or equal, countertop w/ integral 4" coved backsplash and sidesplash.
3. Cooking Range Backsplash: Entire length of cabinets, .050 thick plastic laminate, WilsonArt or equal, w/chrome protective edging set from the underside of wall cabinet to 6" below countertop height (30" A.F.F.).
4. Window Shades: Non-vinyl fabric made with polyester, recycled, and/or natural materials with hanging hardware. (HotBlinds or Graber)
6. Wire shelving by Closetmaid, Rubbermaid or equal with commercial-grade brackets. Min. 12" deep shelves, two per closet.

DIVISION 13 SPECIAL CONSTRUCTION N/A

DIVISION 14 CONVEYING EQUIPMENT

A. Scope

1. Platform lift or
2. Passenger elevator

B. Materials

1. Garaventa Genesis Platform Lift
2. or 2000 lb. capacity passenger elevator

DIVISION 15A PLUMBING

A. Scope

1. Insulate all new piping for new work.
2. Drain, waste, and vent piping.
3. Gas piping for rooftop air handling units
4. Roof drains; coordinate with Division 7 Thermal and Moisture Protection
5. Floor drains
6. Kitchen and Bathroom fixtures shall be low flow.
7. Access panels as required.

B. Materials

1. Hot & cold water distribution: Cross linked polyethylene (PEX) installed with a home-run distribution manifold to eliminate (or minimize) the elbow and tee connections in the plumbing system.
2. Vandal resistant Josam, Zurn or equal hammer arrestors and Vacuum Breakers at hose bibs.
3. Kitchen Sink – Stainless steel sink (double-bowl) and single-lever faucet by American Standard or equal.
4. Lavatory: ADA compliant, wall-mount, vitreous china, Kohler K-2035 or equal and stainless steel single lever faucet by Moen L4621 Chateau with 0.5 aerator, or equal
5. Water Closet: Kohler Wellworth or Cimarron Comfort Height, Niagara Flapperless, 1.28 gals/flush max.

DIVISION 15B HEATING, VENTILATION, AND COOLING

A. Scope

1. split system, roof top air-handling unit with a full economizer and power exhaust
Meet ASHRAE Standard 6.2.
2. Kitchen range hood to be direct-vented to exterior.
3. Bath fans
4. Must pass EnergyStar Thermal Bypass Inspection Checklist. Contractor to notify Owner and Architect when envelope and HVAC related work is complete in order to perform the necessary testing (window air and water infiltration; blower door).

B. Materials

1. Ventilation in restrooms: Broan or equal.
2. Range vents by GE or equal: sidewall weather hood exterior vent with back-draft dampers, rigid metal duct (no flex).
3. Ventilation:
 - a. Carrier 15-ton or equal
 - b. Enthalpy Controlled economizer
 - c. Ducts to have 1" anti-bacterial, internal sound lining.
4. Air Cooled Liquid Chiller. Carrier or equal
5. All vents to exterior shall be completely sealed to prevent leakage to interior or hidden spaces.
6. Variable speed fan with speed control by Greenheck model # GB-081-4X-R2, 475 CFM at .375 static pressure

DIVISION 15C FIRE PROTECTION

A. Scope – new fire protection system to meet NFPA, state and local codes. Note UL tests.

1. An existing wet pipe sprinkler system per plans.
2. Seal all sprinkler penetrations in the vapor barrier or exterior and party wall to maintain air

tightness and sound transmission coefficients.

3. Provide completely all fire protection fixtures, devices, pipe, sleeves, hangers, and so forth, together with all appurtenances hereinafter specified or shown on the drawings in accordance with NFPA Bulletins 13, 13R and 14.
4. Provide working and certified fire protection service

B. Materials

1. Dry sprinkler heads in non-conditioned areas (exterior canopied areas)
2. Wet sprinkler heads in conditioned areas.

DIVISION 16A ELECTRICAL

A. Scope

1. Work included:
 - a. arc-fault circuit breakers, light fixtures, switches, receptacles, outlet boxes, raceways, GFCI and AFCI receptacles, connections necessary for appliances, HVAC motors and equipment, branch circuit wiring, feeder cables, service feeders, service equipment
 - b. wiring for power-open main lobby entry doors and gates at passageways, lighting control system, and all else shown or specified.
 - c. motion sensor lighting in all common areas
2. Ventilation: (refer also to Division 15B HVAC) Provide wiring to new fans and roof top AHU as needed to electrical panels.
3. Hardwired 120V photoelectric smoke/ CO detector combination according to Fire Dept. requirements. See 16B Fire Alarm.
4. New bollard lights at courtyard. Furnish and install new bollard lights as shown on plans.
5. Paddle-operated automatic door opener, meeting ADA requirements, at front and rear entry doors. Coordinate with Division 8 - Door Hardware.

B. Materials

1. Wiring Methods: Service feeder shall be type XHHW-2 copper in Rigid Conduit; Sub feeders shall be SER copper cable; branch circuits shall be type NM cable #14 AWG copper minimum; Telephone cable shall be CAT5E cable; TV Cable shall be
2. Switches & outlets: Leviton, Eagle or equal, dedicated outlet at boiler. Switches to be Decora or equal.
3. Light Fixtures: All fixtures to be UL Listed with a Class P ballast and classified for quiet operation meeting **EnergyStar** (non-dimming fixtures only) requirements: Light fixtures types and locations as shown in the Plans. LED lamps to replace all existing incandescent or fluorescent lamps. Overhead lights to accommodate 2700-lumen lamps.
4. New bollard lights at sloped walkways at courtyard.
5. Occupancy sensor shall be provided at stairways, halls, and basement.
6. Photocell controls shall be provided for all exterior lighting.

DIVISION 16B FIRE ALARM

A. Scope

1. Devices to be hardwired and meet national, state and local codes
 - a. Smoke detectors
 - b. Heat detectors
 - c. Horn/strobes, speaker/strobe
 - d. Carbon monoxide detectors
2. Control panel with communicator.
3. Emergency lights with battery back-up.
4. Exit signs to be LED illuminated and, where accessible path of egress leading to area of refuge or exit discharge, include International Symbol for Accessibility

B. Materials

1. Fire Alarm System: Notifier, Fire Control Instruments, Fire Lite or equal. The entire system should be under one manufacturer; coordinate existing equipment and devices to ensure compatibility.

End of Outline Specifications



Town of Arlington, Massachusetts

Board of Library Trustees

Summary:

Amy Hampe
(term to expire 1/31/2019)

ATTACHMENTS:

Type	File Name	Description
📎 Reference Material	Hampe_ref.pdf	Town Manager recommendation, Hampe letter of interest, Meeting notice



Town of Arlington
Office of the Town Manager

Adam W. Chapdelaine
Town Manager

730 Massachusetts Avenue
Arlington MA 02476-4908
Phone (781) 316-3010
Fax (781) 316-3019
E-mail: achapdelaine@town.arlington.ma.us

MEMORANDUM

DATE: February 11, 2016
TO: Board Members
SUBJECT: Appointment Library Trustee

This memo is to request the Board's approval of my appointment of Amy Hampe as a Library Trustee with a term expiration date of 1/31/2019.


Town Manager

November 22, 2015

Mr. Adam Chapdelaine
Town Manager
730 Massachusetts Avenue
Arlington, MA 02476

Dear Mr. Chapdelaine,

My name is Amy Hampe and it is with great enthusiasm that I submit my letter of interest for the Library Board of Trustees. I am a life-long patron of and advocate for libraries, and one of the very first things I did when I moved to Arlington over six years ago was to get my library card. As a Friend and donor, I am a dedicated supporter of the Arlington library system, and have used many of its resources for my family and myself.

I believe deeply that libraries play a critical role in our community, and would welcome the opportunity to use my skills, energy, and passion to help the Board establish policies for Arlington's libraries, advocate for excellent library services, serve community needs for library services, and administer the library Trust Funds.

I have developed a wide range of skills through my varied professional and personal experiences, and believe my unique background would be an excellent match for the Board, including:

- Over 15 years of experience working in the for-profit and nonprofit sectors
- Dedicated to community service; served as a board member for the Boys & Girls Clubs of Middlesex County and have been leading projects with Boston Cares for 10+ years
- Motivated by collaboration and building relationships with internal and external partners of all levels
- Strong writing, editing, and proofreading skills honed through diverse marketing roles
- Excellent verbal communication, along with presentation and facilitation skills
- Exceptionally detail-oriented, organized, and proactive, with a customer-service mindset
- Outstanding research skills, and a history of quickly learning new business models and technology platforms, including social media and Salesforce
- Fiscally responsible; successfully managed budgets from \$20,000 to over \$2 million
- Using measurement to improve outcomes; drove a total increase of 32% in the number of applications started over two recruitment seasons at Teach For America
- Extensive training focused on diversity, equity, and inclusiveness
- A can-do attitude and a commitment to learning and continuously improving

Thank you for your time and consideration, and I look forward to learning more about your vision for the future of the Board and the role of the Trustees. I can be reached at 617-823-8442 or amy.hampe@gmail.com for any follow-up questions regarding my application.

Kind regards,
Amy Hampe

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
JOSEPH A. CURRO, JR.



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 11, 2016

Amy Hampe
63 Coolidge Road
Arlington, MA 02476

Re: Appointment: Board of Library Trustees

Dear Ms. Hampe:

As a matter of the standard appointment procedure, the Board of Selectmen requests that you attend a meeting of the Board of Selectmen at Town Hall, Selectmen's Chambers, 2nd Floor, 730 Massachusetts Avenue, on Monday, February 22nd at 7:15 p.m.

It is a requirement of the Board of Selectmen that you be present at this meeting. Your presence will give the Board an opportunity to meet and discuss matters with you about the area of activity in which you will be involved.

Please contact this office to confirm the date and time with either Mary Ann or Fran at the above number.

Thank you.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script that reads "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr



Town of Arlington, Massachusetts

Commission on Disabilities

Summary:

Liza Molina

(term to expire 6/30/2017)

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Molina_ref.pdf	Town Manager recommendation, Molina letter of interest and resume, Meeting notice

RECEIVED
SELECTMEN'S OFFICE
ARLINGTON, MA. 02174

FEB 12 11 01 AM '16



Town of Arlington
Office of the Town Manager

Adam W. Chapdelaine
Town Manager

730 Massachusetts Avenue
Arlington MA 02476-4908
Phone (781) 316-3010
Fax (781) 316-3019
E-mail: achapdelaine@town.arlington.ma.us

MEMORANDUM

DATE: February 19, 2016
TO: Board Members
SUBJECT: Appointment to Disability Commission

This memo is to request the Board's approval of my appointment of Liza Molina, 34 Hamilton Road #307, to the Disability Commission with a term expiration date of 6/30/2017.

A handwritten signature in blue ink that reads "Adam W. Chapdelaine".
Town Manager

Disability Commission
27 Maple Street
Arlington, Ma 02478
Jjones@town.arlington.ma.us

January 5, 2016

Dear Mr. Jones,

In response to our conversation of 1/4/16, I am forwarding a copy of my resume for consideration as a member of the Town of Arlington Commission on Disability. As my resume reflects, my formal education is in the fields of Policy & Planning and Public Health. For over fifteen years, I have worked as an evaluator of health & human service programs that serve the disabled and disenfranchised. I made these educational and professional choices as a young healthy person. However, nothing other than personal experience can prepare an individual to face the challenges of chronic illness or disability. It is in the spirit of both professional and personal experience, understanding and commitment, that I am interested in serving on the Disability Commission.

I welcome the opportunity to address any additional questions you might have and to meet with deciding committee members at their convenience. I can be best reached by email or phone at the number posted below.

Sincerely,

Liza Di Mare Molina, ScD, MPH

Mobile: (617) 642-8281

Email: EvaluationResearchers@gmail.com



L.D. Molina, ScD, MPH

Public Profile: <https://www.linkedin.com/in/cambridgemeasurementgroup>

Website: www.CambridgeMeasurementGroup.com

Email: EvaluationResearchers@gmail.com

(617) 642-8281

EDUCATION

HARVARD UNIVERSITY, School of Public Health, Boston, Ma.

ScD, MPH: Community & Family Health, Social & Behavioral Epidemiology, Evaluation Research

CORNELL UNIVERSITY, Art, Architecture & Planning, Ithaca NY.

BA-MRP: Regional Planning, Policy & Management

COLUMBIA UNIVERSITY, Teachers College, New York, NY.

Policy Fellow: National Center for Children and Families (NCCF); Children's Defense Fund

EVALUATION & DEVELOPMENT

CAMBRIDGE MEASUREMENT GROUP (CMG), Cambridge, Ma.

2001-Current

Principal Consultant

Provide culturally relevant grant writing, program evaluation, & technical assistance to Arts, Health, Multi-service, & Educational organizations serving low income children, families and immigrant communities. Over a hundred non-profit organizations served. CMG has written over \$15 million in winning City, State, Federal, & Foundation grants, and is federally approved as an external program evaluator.

CASPAR INC. Somerville, Ma

2011-2013

Grants & Performance Evaluator (Part-Time)

Grant writing to support a \$6 million annual operating budget to support emergency services and continuum of care for residents in recovery. Monitored compliance with grant contract terms.

JOHN SNOW INSTITUTE, Boston Ma.

2003-2011

Research & Evaluation Consultant

Worked with JSI in fulfillment of its Health Care reform mandate which requires bridging research and implementation of best practices to improve health of individuals and communities throughout the world. Multi-dimensional support, Mixed Methods and Survey Research, Data Analysis, Interviews, Grant Writing, Publications, & Presentations.

LATIN AMERICAN HEALTH INSTITUTE, Boston, Ma.

1999-2001

Development Director

Managed grant writing & development activities for \$4.1 million budget to support services for Children, Families, and LGBT clients. LHI is New England's first public health organization to provide culturally competent and technologically appropriate health care services to the Portuguese and Spanish speaking community.

HIGHER EDUCATION

- UNIVERSITY OF ST. AUGUSTINE for Health Sciences, St. Augustine, FL. 2014-2015
Contributing Faculty (Online)
Research Methods, Statistics, and Curriculum Design for D.Sc. and Ed.D programs.
- THESIS THERAPY, Cambridge, Ma. 2006-Current
Principal Consultant
Provide external consulting support in research design, data analysis & coaching to graduate students in Social, Behavioral, Management, and Clinical Sciences.
- ST. JOHN FISHER COLLEGE, SCHOOL OF EDUCATION, Rochester, NY. 2012-2014
Executive Mentor
Instruct and mentor in research statistics and SPSS programming for Doctor of Education candidates.
- CAMBRIDGE COLLEGE, School of Management & School of Education, Cambridge, Ma. 2002-2014
Senior Adjunct Faculty
Designed & taught courses including Advanced Quantitative Methods, Analysis & Communication; Grant Writing; Health Care Systems, Research Ethics; Research & Technology; Technical Writing.
- NORTHERN NEW MEXICO COLLEGE, College of Nursing and Health Sciences, Espanola, NM. 2006-2007
Program Director, Integrative Health Science
Modified curricula for B.S. degree program to meet North Central Association of Colleges and Schools (NCA), U.S. Department of Education, and Council for Higher Education Accreditation (CHEA) standards, National Commission for Health Education Commission (NCHEC). Developed marketing, wrote press releases and promotion material; appointed and evaluated adjunct faculty, advised and monitored student performance.
- TUFTS SCHOOL OF MEDICINE, Family Medicine & Community Health, Boston, Ma. 1999-2004
Clinical Instructor (Section)
Epidemiology & Bio-statistics, and Patient-Doctor Communication, for first year Medical students.

SELECTED PUBLICATIONS

- Molina, L.D. (2015) Basic Research Strategies: A Guidebook for Stressed Thesis & Dissertation Writers, I Universe, Bloomington, IN.
- Molina, L. (2012) Challenging Informed Consent: Legal Considerations. Feminist Ethics Project, Brandeis U. Waltham, Ma.
- Molina, L. Envisioning New Possibilities: SAMHSA addiction recovery program: *J Pastoral Counseling*: V.XLII, 70-73, 2007.
- R. Vega, L. Molina, T. Mangione ... *Strengthening the community's capacity to respond to HIV and substance abuse problems: Inter-organizational relations as an indicator of prevention capital*. JSI Research & Training Institute, Inc., SAMHSA,
- Molina, L. Readability of education materials targeted at women seeking surgical sterilization, *Int. J Gyn Obs.* 2001 May; 73 (2):177-8.
- Molina, L. (1997) Surgical Sterilization in the United States: Psychometrics, Informed Consent & Bio-ethics In Context, Rare Books, HOLLIS No. 00772490, Harvard University, Cambridge, Ma.

OTHER

Board of Directors: Our Bodies Ourselves, Moving People Dance Theatre, Arlington Center for the Arts

Memberships: American Public Health ACA (APHA), American Evaluation ACA, National Council on Measurement in Education (NMCE)

Certifications: Acupuncture Detoxification Specialist; Protecting Human Research Participants, Office of Extramural Research, NIH

Software: Microsoft Office, ETO, GPRA, Survey Gizmo, Qualtrics, Survey Monkey, SPSS

Languages: Exemplary written and spoken English. Working proficiency in Spanish & Portuguese

** References Upon Request **

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
JOSEPH A. CURRO, JR.



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 11, 2016

Liza Molina
34 Hamilton Road #307
Arlington, MA 02474

Re: Appointment: Commission on Disability

Dear Ms. Molina:

As a matter of the standard appointment procedure, the Board of Selectmen requests that you attend a meeting of the Board of Selectmen at Town Hall, Selectmen's Chambers, 2nd Floor, 730 Massachusetts Avenue, on Monday, February 22nd at 7:15 p.m.

It is a requirement of the Board of Selectmen that you be present at this meeting. Your presence will give the Board an opportunity to meet and discuss matters with you about the area of activity in which you will be involved.

Please contact this office to confirm the date and time with either Mary Ann or Fran at the above number.

Thank you.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script that reads "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr



Town of Arlington, Massachusetts

Cyrus Dallin Art Museum, Board of Trustees

Summary:

Ann-Marie Delaunay-Danizio
Meghan McDavid
(terms to expire 2/28/2019)

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Dallin_appt._recommendation.pdf	Dallin Board of Trustees recommendation to appoint
▢ Reference Material	Delaunay_resume.pdf	Delaunay-Danizio resume, meeting notice
▢ Reference Material	McDavid_resume.pdf	:McDavid resume, meeting notice



February 4, 2016

Board of Selectmen
Attn: Kevin Greely, Chairman
Town Hall
Town of Arlington, MA 02474

Dear Selectmen,

The Board of Trustees of the Cyrus Dallin Art Museum at its meeting on 12 January 2016 recommended the reappointment of trustees **Aimee Taberner** and **Sarah Burks** for terms of 3 years. Their current appointments expired in May and December of 2015, respectively.

In addition, the Board of Trustees recommended the following new appointments: **Anne-Marie Delaunay** and **Meghan McDavid** to the Board of Trustees for terms of 3 years each. Each of these candidates have been very involved with the museum for over a year. They volunteer as docents, help with museum events, and attend board meetings.

The addresses of these candidates are as follows:

Sarah Burks
993 Mass Ave., #225
Arlington, MA 02476

Aimee Taberner
41 Wellington St.
Arlington, MA 02476

Anne-Marie Delaunay-Danizio
36 Curve St.
Waltham, MA 02451

Meghan McDavid
270 Highland Ave. #34
Somerville, MA 02143

Please let me know what additional information is required and when this matter may be scheduled for consideration. We appreciate your support and attention to this matter.

Sincerely,

A handwritten signature in blue ink that reads 'Sarah L. Burks'. The signature is fluid and cursive, with a long, sweeping underline.

Sarah Burks, Chair
Cyrus Dallin Art Museum Board of Trustees

Anne-Marie Delaunay-Danizio

36 Curve Street, Waltham MA 02451
Home: 781 640 0815 - amdelahunay@gmail.com

Summary

- Free-lance artist
- Free-lance writer
- Associate Trustee and docent at The Cyrus E. Dallin Museum
- Taught in France, Germany and the States from Pre-K to adults

Highlights

- | | |
|---------------------|----------------------------------|
| • Visual Arts | • Research |
| • Writing | • Art History and Interpretation |
| • Language Teaching | • Docenting |

Experience

Museum Experience

- Cyrus E. Dallin Museum: Associate Trustee and Docent

March 2015 - current

- Danforth Art Museum and School: Curatorial/Education Intern

March 26-June 8, 2013

Writer

- Currently working on a short novel
- Institute of Children Literature: Diploma, *Writing for Children and Teenagers* - September 2015
- Long Ridge WritersGroup: Diploma, *Breaking into Print* - March 1996
- Poetry in French and English

Visual Artist

Artist Statement

As a second grader in Paris in the early sixties, I made accidental ink stains on the lines of my notebook that seemed to crawl or fly off the page, so do my present works, which I see as a live blend of lines and visual poetry. My black and white, intricate and complex drawings, reflect on the endless and open interweaving of the intimate and the collective.

Juried group exhibitions

- Arlington Center for the Arts, Arlington, MA. *Annual Members Show*. January 23-February 20, 2015
- Danforth Art Museum and School, Framingham, MA. *Community of Artists*. June 8-August 2014
- Culture Inside Gallery, Steinsel, Luxembourg. *Order and Disorder* (International Artists Show). March 2014-March 2015
- Arlington Center for the Arts. *Small Works*. December 5, 2013-January 30, 2014.
- Danforth Art Museum and School. *Off the Wall*. June 8 -August 4, 2013
- Arlington Center for the Arts. *Magical Journeys and Unexpected Adventures*. November-December 2013
- Arlington Center for the Arts. *Regeneration*. November 21, 2013 -January 31, 2011

Galleries

- The Artful Heart Gallery, Arlington, MA. 2011-current

Teacher

Lecturer in French

Northeastern University, Boston, MA. September 1989-May 1996. (Undergraduate and Continuing Education Students).

Boston Conservatory, Boston, MA. September 1995-May 1996. (Voice Students).

Tufts University, Medford, MA. September 1993-May 1995. (Undergraduate Students).

Pre-K and Elementary School Teacher

Walnut Park Montessori School. Newton, MA. French Teacher (Pre-K). September 2001-June 2003.

Mönchhof-Grundschule, Heidelberg, Germany. French Teacher (grade 3-4). September 1984-June 1986.

Toulouse, France. PreK and Elementary school teacher. September 1976-June 1984.

Education

Master of Arts : Museum Studies, 2015

Harvard University Extension School - Cambridge, MA, USA

Capstone Paper title: *Tensions: Contemporary Art at the Boston Museum of Fine Arts*.

Master of Arts : Art History, 1993

Harvard University Extension School - Cambridge, MA, USA

Thesis title: *Camille Claudel and Suzanne Valadon: Two women artists in Fin-de-Siècle France*.

Bachelor of Arts : English Literature, 1989

Emmanuel College - Boston, MA, USA

Teaching Certificate : Education, 1977

Ecole Normale d' Instituteurs - Toulouse, France

I was enrolled in a two year teaching program from 1974 to 1976 and obtained a pre-K and elementary school teaching certificate in January 1977.

Awards

Recipient of an *Annamae and Allan R. Crite Prize*. Harvard Extension School. June 1993.

The prize is named in honor of Boston African American artist, Alan R Crite and his mother, Annamae, both former graduates of Harvard Extension School.

"The prizes are awarded for singular dedication to learning and the arts to outstanding *Bachelor of Liberal Arts* and *Master of Liberal Arts* degree recipients."

Professional Affiliations

Cyrus Dallin Museum

Arlington Center for the Arts

Danforth Art Museum and School

The Artful Heart Gallery, Arlington, MA

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
JOSEPH A. CURRO, JR.



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 16, 2016

Ann-Marie Delaunay-Danizio
36 Curve Street
Waltham, MA 02451

Re: Appointment: Cyrus Dallin Art Museum, Board of Trustees

Dear Ms. Delaunay-Danizio:

As a matter of the standard appointment procedure, the Board of Selectmen requests that you attend a meeting of the Board of Selectmen at Town Hall, Selectmen's Chambers, 2nd Floor, 730 Massachusetts Avenue, on Monday, February 22nd at 7:15 p.m.

It is a requirement of the Board of Selectmen that you be present at this meeting. Your presence will give the Board an opportunity to meet and discuss matters with you about the area of activity in which you will be involved.

Please contact this office to confirm the date and time with either Mary Ann or Fran at the above number.

Thank you.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script, reading "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr

Meghan A. McDavid

270 Highland Ave. #34, Somerville, MA 02143 • (267) 614-0826 • MeghanAMcDavid@gmail.com

Professional Experience

Accenture, Boston, MA

2011-Present

Strategy Consultant, promoted from Strategy Senior Analyst and Management Consulting Analyst

- Planned and executed 3-day workshop for 160 clients in collaboration with diverse team. Navigated unsettled landscape and numerous inconsistent goals in order to define approach and draft agenda
- Workshop resulted in the handoff of ownership of 35 change initiatives from the IT program to business leaders
- Led a team to identify how various business units, particularly sales and sales support, would be impacted by new or shifting functionalities as a result of the implementation of a new system
- Planned and executed a series of meetings with clients across 6 teams to discuss, document and review the changes, resulting in the identification of over 200 specific impacts to the business affecting 35,000 users
- Defined, developed, and identified key stakeholder for 50 projects to drive critical process and/or organizational change across the client enterprise, of which 45 were undertaken, driving meaningful results
- Managed the development of 30 procedures, for a newly-formed group of 500 resources
- Collaborated with subject matter experts to develop and deliver training for over 400 users starting a new role
- Coordinated evolution and execution of testing metrics to provide a clear view of performance across groups, highlighting opportunities for improvement
- Managed crucial metrics regarding the distribution of customer communications from client's vendor while navigating a complex, challenging relationship between client and their vendor
- Worked with diverse clients including data storage & cloud computing company, multinational media broadcasting & cable company, leading commercial bank, pharmacy benefits manager, global medical products company

Accenture Management Consulting Development Program

2012-2014

Communications Lead (Boston)

- Managed communications and event invitations to management consulting analysts
- Created, edited and distributed monthly publication highlighting key office- and firm-wide events and news

Bryan Lentz for U.S. Congress Campaign, Springfield, PA

Summer - Fall 2010

Press Intern

- Drafted press releases, conducted time-sensitive opposition, issue, and policy research

Education

Dartmouth College, Hanover, NH

June 2010

Bachelor of Arts in History, G.P.A.: 3.68, *Cum Laude*

2010 Morton Memorial Prize recipient for best paper in European History

Dartmouth Women's Rugby Club, Hanover, NH

2006- 2010

Captain (2009-10), Match Secretary (2008-09), Alumnae Chair (2007-08)

- Managed and led the team on the field; planned schedules and transportation to away matches, including the national championship in Florida; edited, contributed to, and distributed newsletter to over 500 households

Epsilon Kappa Theta Sorority, Hanover, NH

2007-2010

New Member Education Chair (2009-10)

- Planned events for new members, including community service activities and an off-campus cabin trip

The Art of Traveling, Hood Museum, Dartmouth College

Fall 2008

Co-Curator

- Organized public exhibition of material from student foreign travel journals, including advertising and press

Personal

Volunteer Docent for Cyrus E. Dallin Art Museum, December 2014 – present, led gallery tours, facilitated activities during ARTventure Family Days program, provided key advertising & logistical support for Summer Soiree fundraiser

KIPP Academy, Volunteer, 2014 - 2015, reviewed resumes, conducted mock interviews with high school students

Dartmouth Alumni Interviewer, 2010 – present, interviewed applicants and wrote reports for Admissions Office

Additional interests include traveling, art, photography, history, reading

OFFICE OF THE BOARD OF SELECTMEN

KEVIN F. GREELEY, CHAIR
DIANE M. MAHON, VICE CHAIR
DANIEL J. DUNN
STEVEN M. BYRNE
JOSEPH A. CURRO, JR.



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 16, 2016

Meghan McDavid
270 Highland Avenue, #34
Somerville, MA 02143

Re: Appointment: Cyrus Dallin Art Museum, Board of Trustees

Dear Ms. McDavid:

As a matter of the standard appointment procedure, the Board of Selectmen requests that you attend a meeting of the Board of Selectmen at Town Hall, Selectmen's Chambers, 2nd Floor, 730 Massachusetts Avenue, on Monday, February 22nd at 7:15 p.m.

It is a requirement of the Board of Selectmen that you be present at this meeting. Your presence will give the Board an opportunity to meet and discuss matters with you about the area of activity in which you will be involved.

Please contact this office to confirm the date and time with either Mary Ann or Fran at the above number.

Thank you.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script that reads "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr



Town of Arlington, Massachusetts

Request: Sidewalk Fixture Permit

Summary:

Bierbrier Development, 1398 Massachusetts Ave., Tom Godfrey

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Ref_Mat._2.22.16_Sidewalk_Fixture__Permit.pdf	Sidewalk Fixture Permit Application

PERMIT APPLICATION REPORT

Type of License: Outdoor Furniture Permit

Name of Applicant: Tom Godfrey for Bierbrier Development

Address: 1398 Massachusetts Ave.

The following Departments have **no objections** but have made comments or conditions regarding the issuance of said license: (see attached)

- Planning x
- ADA Compliance x

Note: Board of Health and Building Inspections does not have to report.

PLEASE NOTE: ALL APPROVALS WILL BE SUBJECT TO CONDITIONS SET FORTH (SUCH AS DEPARTMENT CONDITIONS, CERTIFICATE OF INSURANCE ETC.)

**BOARD OF SELECTMEN
TOWN OF ARLINGTON - INSPECTION REPORT**

Report is due at the Office of the Board of Selectmen by **Wednesday, February 12, 2016**

ONE REPORT IS REQUIRED FROM EACH DEPARTMENT.

Location: 1398 Massachusetts Avenue
Applicant's Name: 1398 Massachusetts Avenue, LLC c/o Bierbrier Development
D/B/A:
Telephone: 781-258-1199 email: Tomg10@comcast.net
Department: (date sent out): 1.19.16

Meeting date: February 16, 2016

RE: OUTDOOR FURNITURE LICENSE

Inspected by: Board of Health
Building
Planning – Ted Fields, 2.11.2016
ADA Compliance

Inspection Report Comments:

1398 Massachusetts Avenue is an existing block of stores on a 35,632 square foot lot in the Arlington Heights commercial district. Business tenants include Message Envy, Prime the Butcher and, in the near future, a Doctors Express urgent care clinic (in the former Bagleville storefront). The former Jenny Craig space on the eastern end of the block is vacant. All of these are small enterprises serving residents of Arlington Heights and East Lexington. It is located in a B3 (Village Business) zoning district. The sidewalk abutting the block is nine (9) feet wide and the structure's façade along Massachusetts Avenue is approximately one hundred and fifteen (115) feet long.

Proposal Details

The applicant proposes to place **one small planter** (four feet long, two feet wide and one & one half feet high) and **two long planters** (each nine feet long, two feet wide and one & one half feet high) by the driveway curb cut leading to the parcel's rear parking lot (see the attached pictures and application). As proposed, these planters are two feet away from curb along Mass. Avenue, leaving at least four (4) feet of width for unobstructed travel along the public sidewalk, meeting the recommended standard (4 feet).

Planning Department's Recommendations

The Dept. of Planning and Community Development has no objection to the issuance of the Sidewalk Fixture license to the applicant at the location in question.

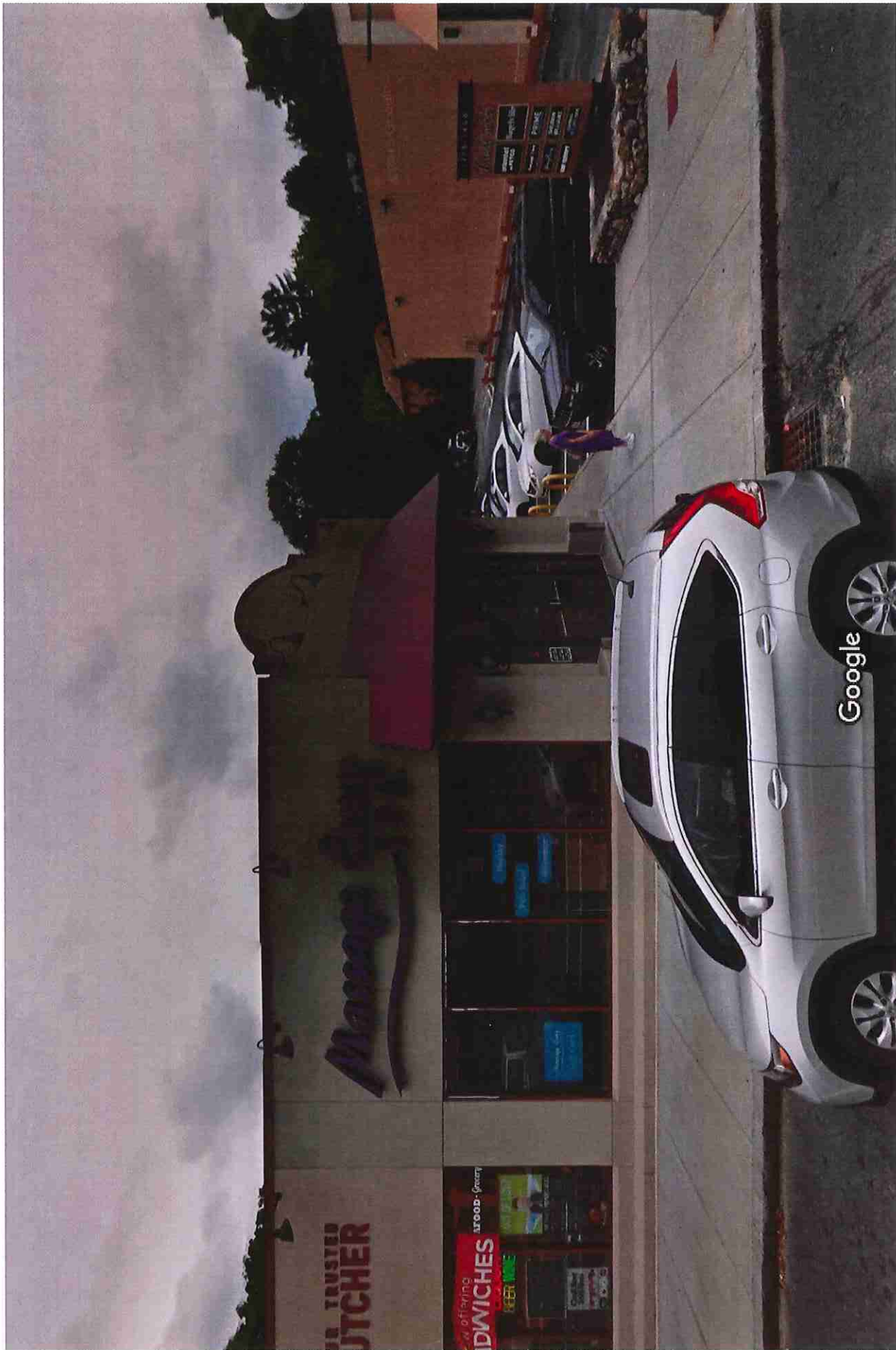
Applicant Section:

I have received the above report and acknowledge said inspection. I fully understand that no work is to commence at the premises of the proposed location of which is the subject matter of this inspection report until the license is approved by the Board of Selectmen; furthermore, any work done is done at the applicant's risk.

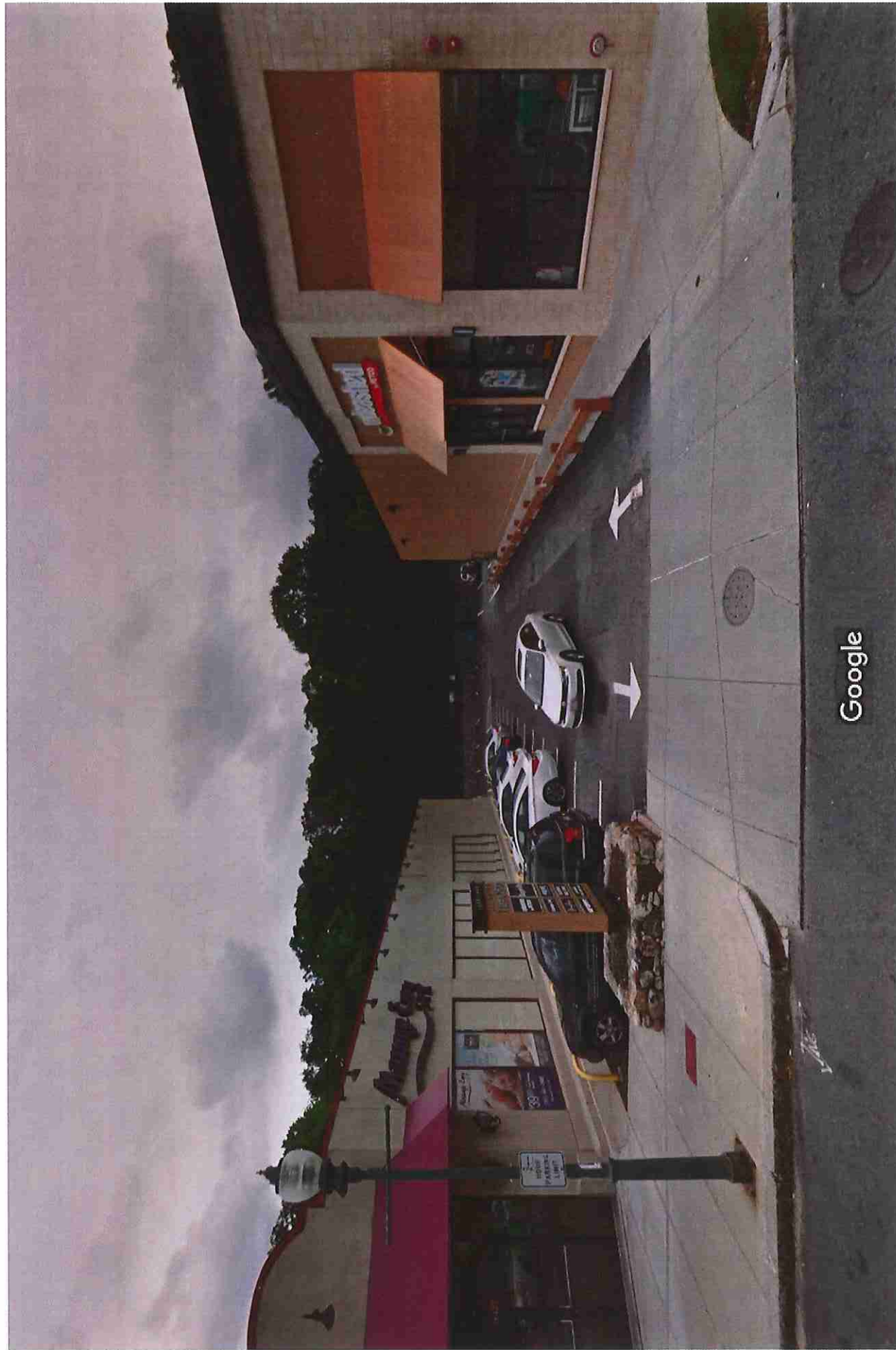
Applicant's Name: _____

Date: _____

Google Maps 1381 Massachusetts Ave



Google Maps 1385 Massachusetts Ave



Google

**BOARD OF SELECTMEN
TOWN OF ARLINGTON - INSPECTION REPORT**

Report is due at the Office of the Board of Selectmen by February 2, 2016
ONE REPORT IS REQUIRED FROM EACH DEPARTMENT.

Location: 1398 Massachusetts Ave.
Applicant's Name: 1398 Massachusetts Avenue, LLC c/o Bierbrier Development
D/B/A:
Telephone: 781 258-1199 email: tomgl10@comcast.net
Department (date sent out): 1.19.16

Meeting Date: FEBRUARY 16, 2016

RE: OUTSIDE FURNITURE LICENSE

Inspected by: Board of Health

Building

Planning

☒ ADA Compliance

Comments by each Division or Department:

As stated in the Sidewalk Fixture(s) Permit Application an unobstructed pedestrian path of at least 36 inches, preferably 48 inches clear excluding curbing must be provided.

Applicant Section:

I have received the above report and acknowledge said inspection. I fully understand that no work is to commence at the premises of the proposed location of which is the subject matter of this inspection report until the license is approved by the Board of Selectmen; furthermore, any work done is done at the applicant's risk.

Applicant's Name: _____

Date: _____

Sidewalk Fixture(s) Permit Application - Town of Arlington, MA

This is an application to the Board of Selectmen of the Town of Arlington Massachusetts, for a permit to place and maintain fixture(s) on sidewalks on the public right of way in Arlington, Massachusetts described below:

(PLEASE TYPE OR PRINT)

Business Name:

1398 Massachusetts Avenue, LLC

Business Address/Location:

1398 Massachusetts Avenue

Phone Number/Email:

781-258-1199/tomg10@comcast.net

Business Representative's Name:

Tom Godfrey

Name & Address of Building Owner:

1398 Massachusetts Avenue, LLC

c/o Bierbrier Development, Inc.

420 Bedford Street, Suite 335

Lexington, MA 02420

Length of Storefront (ft):

see attached

Width of Sidewalk along Storefront (ft); *1:

see attached

Length of Proposed Sidewalk Café (ft):

N.A.

Width of Proposed Sidewalk Café (ft); *2:

N.A.

*1: Measure from front Building Wall to inside of sidewalk granite curb edge.

*2: Measure from front Building Wall to outside of the sidewalk fixture(s).

Application Submittal Requirements:

- 1.) Fee: An annual permit fee of \$50.00 payable to the Town of Arlington filed with the Selectmen's Office. The Board may prorate its fee for applicants in their initial term to reflect the number of months the permit sought will be held.
- 2.) Site Plan: Furnish a **Site Plan** (scale diagram) showing the location of the sidewalk fixture, as well as a **picture or photograph of the proposed fixture(s)** in compliance with the following requirements:
 - No person or entity shall cause to be placed within the public ways any furniture/fixture(s) without applying for a permit and receiving approval from the Board of Selectmen of the Town. This permit shall be considered separate and distinct from others issued by the Town, including those for common victuallers.
 - Ordinarily, the location of the sidewalk fixture(s) must be directly in front of the business operating the storefront, and may not extend beyond the side property lines. It shall be sited as close to the building façade as practicable and in no event to exceed twelve (12) feet from the food service door of the establishment.

- Under limited circumstances, sidewalk fixture(s) may be approved adjacent to a storefront, grouped at a distance from the storefronts, or allowed in both positions if a scaled plan showing dimensions clearly establishes:
 - a) The requested location(s) create the least obstruction for pedestrian access to storefronts, crosswalks and pedestrian circulation, and/or
 - b) the location does not extend substantially beyond the side edges of the business (allowing for up to 10 feet of latitude where landscaping, public facilities, utility poles or adjacent seating areas obstruct the front of the business premises), and/or
 - c) in every case, the additional sidewalk fixture(s) does not violate zoning, building, or other code as determined by the Director of Inspectional Services.
- Further, sidewalk fixture(s) shall be located so that they do not impede, endanger or interfere with pedestrian traffic, with a minimum width of three (3) feet and a recommended width of four (4) feet of unobstructed passage for pedestrian traffic.
- In addition, no sidewalk fixture(s) shall be affixed, erected, installed, placed, used or maintained **within five (5) feet** of any marked or unmarked crosswalk or handicapped ramp; or within five (5) feet of any fire hydrant, fire lane, call box, or bus stop.
- Unlicensed fixture(s) within the public ways of the Town will be subject to removal with the cost thereof to be borne entirely by the owner. In addition, fines may be imposed by the Board of Selectmen not to exceed \$100 for removal, storage or destruction.
- No fixture(s) or device(s) shall be attached to the sidewalk or other public area. The property owner is responsible for the restoration of the sidewalk or public-right-of-way if any damage is caused by the sidewalk fixture(s).

3.) **Insurance:** The applicant business-owner shall furnish a **certificate of insurance** providing commercial insurance coverage for bodily injury, death, disability, and property damage liability in the following amounts:

- **At least ten thousand (\$10,000)** the Town of Arlington shall be named as an additional insured on a primary, noncontributory basis for any liability arising directly or indirectly from the fixture(s). In the event the insurance is cancelled, the permit holder has 24 hours to reinstate the insurance or the permit shall be revoked. The permit holder shall immediately inform the Selectmen's Office if insurance under this provision is revoked and shall not operate with the sidewalk fixture until insurance is restated in accordance with this requirement. An insurance certificate naming the Town as an additional insured must be provided to the Office of the Board of Selectmen before any Sidewalk Fixture(s) Permit will be issued.

4.) Indemnification and Acknowledgement of Rights: The applicant shall also furnish a signed agreement to indemnify the Town of Arlington for its use of public property from any and all claims that may be brought against the Town in connection with such use. Such a signed agreement shall also acknowledge the Town's rights with respect to its property and the limitations of the permit (attached hereto).

5.) Compliance Requirements: By signing this application, the Applicant agrees to accept and comply with the following requirements:

- Permit holders must ensure that the requirements for operation are met. These include:
 - All areas within and surrounding a sidewalk fixture must be maintained in a clean, neat, and sanitary condition.
 - All permit holders shall be required to abide by all federal, state, and local laws.

6.) Other Regulations: By receiving a sidewalk fixture(s) permit, applicants are not exempted from other federal, state, and local laws and regulations. Among other regulations, permit holders must comply with local zoning and state building code requirements and Board of Selectmen regulations. Applicants are strongly advised to ensure their plans comply with zoning and state building requirements by contacting Inspectional Services.

7.) Revocation: The sidewalk fixture(s) permit may be revoked for failure to maintain the standards required for the initial permit. A notice of intent to revoke a sidewalk fixture(s) permit shall be given in writing 10-days prior to actual revocation and shall specify the area or areas of failure to meet requirements and maintain conditions the Town may have imposed. If, during that period, proof of compliance is made to the satisfaction of designated Town Inspectors by the holder of the permit, the permit shall be continued in force.

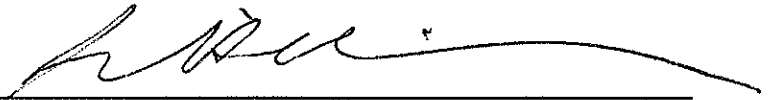
- Applicant certifies that all current property taxes due on its licensed premises are paid if property is owned by the Applicant.
- Applicant agrees to permit the Town to periodically verify the accuracy of information contained in this Application and agrees to provide information requested to verify the accuracy of the information and the Certifications contained in this Application.

8.) Term & Non-Transferability: Each Sidewalk Fixture(s) Permit is valid for one calendar year from the January 1st through December 31st and is non-transferable.

I have read and fully understand the above rules and regulations applying to the approval of this permit.

Dated 1/13, 2016

By: _____



(Signature)

(Print Name & Address) _____

Len Bierbrier

c/o Bierbrier Development

420 Bedford Street, Suite 335

Lexington, MA 02420

OFFICE OF THE BOARD OF SELECTMEN



TOWN OF ARLINGTON

SIDEWALK FIXTURE(S) PERMIT INDEMNIFICATION AGREEMENT & ACKNOWLEDGEMENT

On behalf of the business applying for a Sidewalk Fixture(s) Permit from the Town of Arlington Board of Selectmen, I, as a duly authorized agent of **1398 Massachusetts Avenue, LLC**, a licensed business operating within the Town of Arlington, acknowledge that I seek permission to use a portion of the public sidewalk in front of (or where permitted, adjacent to) the business premises to for a sidewalk fixture(s). I understand that a sidewalk fixture(s) permit does not give my business any right, title, or interest in any part of the sidewalk space approved for use.

Furthermore, I, as a duly authorized agent of **1398 Massachusetts Avenue, LLC**, agree to hold harmless the Town of Arlington, its officers and employees, for any loss or damage arising from the use of the public sidewalk or the discontinuance of use resulting from an order, demand, or notice of any governmental agency with jurisdiction.

I understand that Board of Selectmen and/or any government agency with jurisdiction may revoke my permit to use public sidewalk space at any time for any reason whatsoever. The permit can be revoked for failure to comply with any terms and conditions of the permit or any agreements between my business and the Town of Arlington or for violation of any of the rules and regulations enforced by Board of Selectmen, the Department of Inspectional Services, the Police Department, or the Board of Health. I understand there will be no refund of any fees or compensation paid to the Town of Arlington.

I further agree to promptly remove any property placed on the sidewalk space or reimburse the Town of Arlington for the cost of moving my business' property upon receipt of any written notice, demand, or order to vacate the sidewalk space from a governmental agency with jurisdiction.

I certify that I have read and agree with the terms and conditions outlined both here and within the Sidewalk Fixture(s) Permit Application.

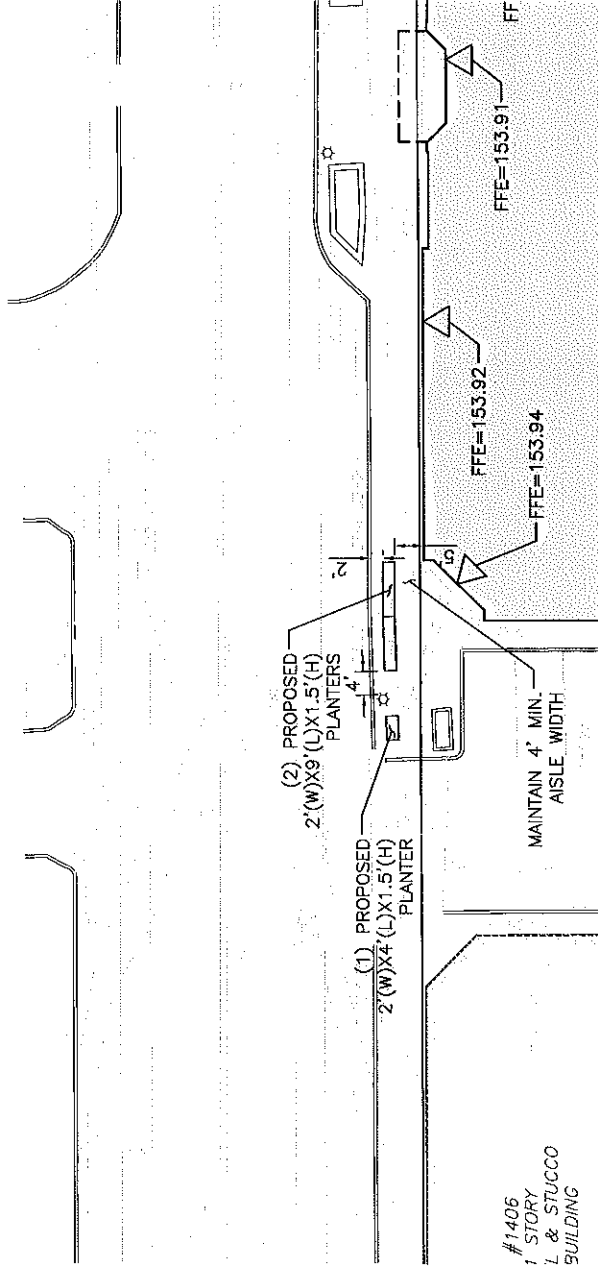
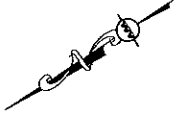
Signature

Date

1/13/16

MASSACHUSETTS AVENUE

(PUBLIC - VARIABLE WIDTH)



GRAPHIC SCALE



(IN FEET)
1 inch = 20 ft

N:\PROJECTS\1477-02A\CIVIL\DRAWINGS\CURRENT\1477-02A - LINework.DWG

APPLICANT/OWNER:

BIERBRIER DEVELOPMENT, INC.
420 BEDFORD STREET
LEXINGTON, MA 02420

PROJECT:

1398 & 1408
MASSACHUSETTS AVE.
ARLINGTON, MA

PROJECT NO. 1477-02A DATE 10-15-2015

SCALE: 1"=20' DWG. NAME: C-1477-02A

DESIGNED BY: ND CHECKED BY: SC

PRINTED BY:



ALLEN & MAJOR
ASSOCIATES, INC.

civil & structural engineering • land surveying
environmental consulting • landscape architecture
www.allenmajor.com

100 CONSUMERS WAY

P.O. BOX 3118

WOBURN MA 01888-0118

TEL: (781) 935-6889

FAX: (781) 935-2896

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PLANTERS PLAN

P-1

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**1398 Massachusetts Avenue, LLC
c/o Bierbrier Development, Inc.
420 Bedford Street, Suite 335
Lexington, MA 02420**

December 22, 2015

Town of Arlington
Board of Selectman
c/o Marie Krepelka, Administrator
730 Mass Ave
Arlington, MA 02476

Re: 1398 Mass Ave
Arlington, MA.

Arlington Board of Selectman,

1398 Massachusetts Avenue, LLC (the "Owner") hereby requests a license to allow for the placement of three (3) landscape planters on the sidewalk in front of 1398 Massachusetts Avenue.

The landscape planters are 24" wide, 18" high and 4' to 9' long and will be planted with seasonal flowers and small shrubs. Owner (or Owner's landscape service) would maintain the landscape planters as part of its regular maintenance. A picture of the proposed planters is attached for reference.

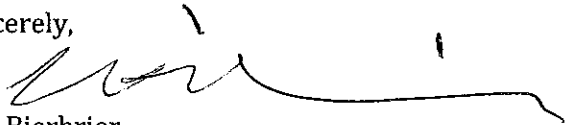
The landscape planters have been carefully located on the sidewalk to maintain an accessible (ADA) pedestrian path of at least 4' in width and will be installed such there is no conflict with automobile doors that may park along the street.

There currently exists a large swath of concrete, approximately 9' in width, in the area where the landscape planters are proposed. The landscape planters will continue the greenspace theme already established by the permanent sidewalk planters that exist in the area.

As it is our understanding that the Engineering Division may be asked to perform a plan review and provide a recommendation, the engineering firm of Allen & Major has prepared a detailed plan (attached) showing the location and dimension of the area.

If you have any questions or need any additional information, please contact Tom Godfrey at 781-258-1199.

Sincerely,



Len Bierbrier
Manager

Enclosure





Town of Arlington, Massachusetts

Discussion and Approval: Lake Street Recommendations

Summary:

Jeffrey Maxtutis, TAC Co-Chair

Howard Muise, TAC Co-Chair

ATTACHMENTS:

	Type	File Name	Description
▣	Reference Material	TAC_Lake_Street_2.16.pdf	TAC e-mail and recommendations 2016
▣	Reference Material	TAC_Lake_Street_12.14.pdf	TAC recommendations 12.18.14

From: Howard Muise <hmuise@verizon.net>
To: mkrepelka@town.arlington.ma.us
Cc: jeffrey.maxtutis@aecom.com, lwiener@town.arlington.ma.us, moores.marjorie@gmail.com, freidy@town.arlington.ma.us, msullivan@town.arlington.ma.us
Date: 02/17/2016 11:31 AM
Subject: Lake Street Corridor Study

Marie

Attached is the "Lake Street Corridor Project ? Manual Signal Simulation Test Report" for the Lake Street agenda item for the Board's February 20 meeting. The Arlington Transportation Advisory Committee (TAC) presented the results of the Lake Street Corridor Transportation Analysis Report (December 2014) to the Board of Selectmen on February 5, 2015. The study was completed to identify potential improvements to safety and vehicle delay along the Lake Street corridor. The TAC report recommended the installation of a new traffic/pedestrian/bicycle signal at the intersection of Lake Street and the Minuteman Bikeway to improve operations and safety. The Board voted to have the TAC conduct a field test simulating a traffic signal with police officer control at the Lake Street/Bikeway intersection. In response to this request, the TAC collected transportation data in the study area for approximately two weeks between Thursday, June 4 and Friday, June 19, 2015 both with and without police officer control simulating a signal. The attached report summarizes the study methodology and results.

Howard, Muise, Chair Arlington Transportation Advisory Committee
Jeff Maxtutis, Vice Chair and TAC Lake Street Working Group Lead

Attachments:

File: [LAKE STREET
Corridor Signal
Simulation Memo Final
1-13-16.docx](#)

Size: 415k Content Type: application/vnd.openxmlformats-officedocument.wordprocessingml.document

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
ARLINGTON TRANSPORTATION ADVISORY COMMITTEE
January 13, 2016

EXECUTIVE SUMMARY

The Arlington Transportation Advisory Committee (TAC) presented the results of the Lake Street Corridor Transportation Analysis Report (December 2014) to the Board of Selectmen (BoS) on February 5, 2015. The study was completed to identify potential improvements to safety and vehicle delay along the Lake Street corridor. The TAC report recommended the installation of a new traffic/pedestrian/bicycle signal at the intersection of Lake Street and the Minuteman Bikeway to improve operations and safety.

The BoS were cautiously supportive of the TAC recommendations, and voted to have the TAC conduct a field test simulating a traffic signal with police officer control at the Lake Street/Bikeway intersection. In response to this request, the TAC collected transportation data in the study area for approximately two weeks between Thursday, June 4 and Friday, June 19, 2015 both with and without police officer control simulating a signal.

The following summarizes the results of the study:

- Lake Street experiences up to 1,200 vehicles during the weekday PM peak hour (4:45-5:45). Almost 400 users on the Bikeway cross Lake Street during the PM peak hour (average of more than six persons crossing every minute).
- Traffic volume on northbound Lake Street at Brooks Avenue during the PM peak hour was 10 to 15% higher with police officer control. Higher traffic volume flow rates were observed for shorter time periods within the overall peak period.
- Bikeway users crossing Lake Street with police officer control during the weekday PM peak period (4:30-6:30) experienced stopped delay between 0 and 40 seconds, with an average delay between 15 and 20 seconds.
- Vehicle travel times on Lake Street between Route 2 and Mass Avenue during the weekday PM peak period were about 4 minutes faster on average with police officer control.
- The vehicle queue lengths on northbound Lake Street during the weekday PM peak period were similar for both the current condition (without police control) and for the simulated traffic signal condition (with police control). However, with police control the vehicles progressed in platoons versus stop-and-go operation with the current unsignalized condition.
- There were 14 crashes at the Bikeway crossing of Lake Street reported between January 1, 2014 and December 31, 2015. Two of the crashes involved pedestrians, five crashes resulted in

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
ARLINGTON TRANSPORTATION ADVISORY COMMITTEE
January 13, 2016

personal injury and seven crashes involved property damage only. The most common type of crash at the Bikeway was rear end collisions.

A new traffic/pedestrian/bicycle signal on Lake Street at the Bikeway would provide a modest improvement in traffic delay and vehicle travel time during weekday peak hours. During off-peak and weekend periods the travel benefits to traffic would be less noticeable. The signal would provide a more orderly, predictable crossing for both Bikeway and Lake Street users.

The TAC recommends the BoS consider pursuing a new signal at Lake Street and the Bikeway crossing. Due to the complexity and issues involved in constructing a new signal at this location, the TAC recommends forming a design review committee. The goal of the design review committee would be to evaluate issues and identify constraints, design details, types and hours of operations, and costs. The committee's results would be used to develop and advance design plans. It is envisioned that, at a minimum, the committee would include members from the TAC, DPW, APD, ABAC, EALS, Walk Arlington, and a traffic engineering consultant.

The data collection effort completed for this study was the largest ever conducted by the TAC. The data collection program was a collaborative effort between TAC, BoS, Town Manager, APD and volunteers consisting of current and former TAC members, ABAC and EALS members and citizens (too many to name). We would like to thank all those who participated in this study.

INTRODUCTION

The Arlington Transportation Advisory Committee (TAC) prepared the Lake Street Corridor Transportation Analysis Report, December 2014 and presented the results at the February 5, 2015 Board of Selectmen (BoS) meeting. Based on the findings of the report, the TAC recommended the installation of a new traffic/pedestrian/bicycle signal at the intersection of Lake Street and the Minuteman Bikeway to improve operations and safety. The signal would be coordinated with the adjacent signal at Lake Street and Brooks Avenue. Other minor items were also recommended to improve operations and safety at the Bikeway crossing.

The BoS were cautiously supportive of the recommendations, and voted to have the TAC conduct a field test simulating a traffic signal with police officer control at the Lake Street/Bikeway intersection. The purpose of the signal simulation test is to estimate the impact of a proposed traffic signal at the intersection of Lake Street and the Minuteman Bikeway on traffic operations along Lake Street and bicycle and pedestrian flow on the Bikeway. In the winter and spring of 2015 TAC coordinated with the Town Manager and Police Department to develop a data collection program.

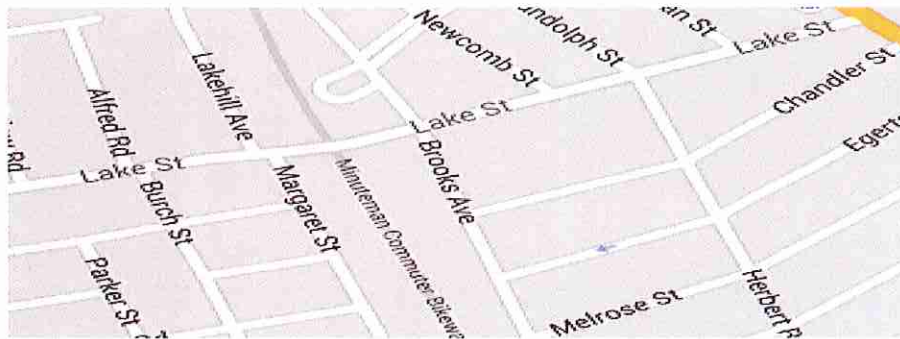
This memorandum presents the results of the signal simulation test.

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
ARLINGTON TRANSPORTATION ADVISORY COMMITTEE
January 13, 2016

STUDY APPROACH

Transportation data were collected in the study area for approximately two weeks between Thursday, June 4 and Friday, June 19, 2015. For the first week, transportation data were collected for existing conditions without police officer control. These results represent existing baseline conditions and were used to compare with the results collected with police officer control at Lake Street and the Bikeway. On Monday through Thursday of the second week, two police officers controlled the Lake Street/Bikeway intersection in coordination with the Brooks Avenue signal between 4:00 and 7:00 PM to simulate the proposed signal at the Bikeway.

Because Route 2 and Mass Avenue in Arlington are generally referred to as east-west roadways, Lake Street was designated as a north-south roadway and Brooks Avenue an east-west roadway for the purpose of this study.



The following transportation data were collected in the Lake Street study area:

- Automatic traffic recorder (ATR) counts were performed on Brooks Avenue east and west of Lake Street and on Lake Street at Cabot Road. Traffic volume was collected by direction for a 16-day period between June 4 and June 19. Traffic volume was recorded for 24 hours each day in 15-minute increments. The Arlington Police Department used a combination of ATR machines and radar recorders to measure traffic volume.
- Manual traffic turning movement counts were recorded at the intersection of Lake Street with Brooks Avenue. Traffic volume and vehicle classification was recorded between 4:30 and 6:30 PM on two Tuesdays (June 9 and 16) and two Thursdays (June 11 and 18). Two volunteers conducted the turning movement counts each survey day, a total of 8.
- Manual volume and classification (pedestrians, bicycles, strollers, etc.) counts of Bikeway users crossing Lake Street were also conducted between 4:30 and 6:30 PM on the same two Tuesdays and Thursdays when the traffic counts described above were conducted. For the second week (June 16 and 18), Bikeway user delay was also measured when police officers stopped the

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
ARLINGTON TRANSPORTATION ADVISORY COMMITTEE
January 13, 2016

Bikeway approaches to allow Lake Street traffic to proceed through the intersection (simulating a green signal indication). There was little or no delay observed for Bikeway users crossing Lake Street during the first week (June 9 and 11) without police officer control. Two additional volunteers conducted the Bikeway counts and measurements each survey day.

- Vehicle travel time runs along Lake Street were recorded in the northbound direction beginning on the Route 2 eastbound overpass over Lake Street and ending at Mass Avenue (approximately 1.2 miles). Travel time runs were conducted between 4:30 and 6:30 PM on June 9, 11, 16 and 18. The number of travel time runs conducted each day varied depending on vehicle congestion and queuing on Lake Street. Travel time runs were performed using a “floating car” technique where the survey vehicle travels at the prevailing traffic speed. Vehicle queue lengths on Lake Street northbound approaching the Bikeway and Mass Avenue were also observed. Two additional volunteers in one vehicle recorded travel times and vehicle queues each survey day.
- Observations of operating transportation conditions along Lake Street and at the intersections with the Bikeway and Brooks Avenue were made by TAC members and traffic engineer Jason Sobel, who was contracted by TAC for consulting services for this study.

On Monday through Thursday June 15-18 between 4:00 and 7:00 PM, two Arlington police officers manually controlled the intersection of Lake Street/Bikeway to simulate conditions of a traffic signal coordinated with the existing signal at the Lake Street/Brooks Avenue intersection. The officers stopped Lake Street traffic at the Bikeway when the Brooks signal had a red indication for Lake Street traffic and allowed traffic to proceed when Lake Street traffic had a green light at the Brooks signal. The timings at the Brooks Avenue signal (40 seconds green time for Lake Street and 25 seconds green time for Brooks Avenue) were approximately replicated by the officers at the Bikeway. Bikeway users crossing Lake Street were stopped (for up to approximately 40 seconds) when traffic was allowed to proceed through the intersection. Pedestrian signal phases occurred regularly at the Lake Street/Brooks Avenue intersection resulting in additional “green” time for Bikeway users to cross Lake Street.

ANALYSIS RESULTS

The traffic volumes, travel times, delay, and queue lengths are summarized below.

Lake Street Traffic Volumes

Table 1 summarizes the PM peak hour (approximately 4:45-5:45) traffic volumes on Lake Street south of Brooks Avenue. The northbound Lake Street peak hour volume at Brooks Avenue was approximately 11 percent greater on average with police officer control than without (609 vs. 546). However, traffic volume throughput was even higher on northbound Lake Street on June 18th starting at 5:00 PM when police officers allocated additional “green” time to Lake Street vehicles when there were no Bikeway users waiting to cross Lake Street (similar to coordinated signal operation). This resulted in a 15 percent increase in northbound Lake Street traffic volumes (629) compared to no police officer control. The peak 15-minute northbound Lake Street flow rate from 5:00-5:15 PM on June 18 was 209 vehicles with officer

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
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control. This rate is approximately 30 percent greater than the highest 15-minute flow rate (160 vehicles on June 9) without police officer control. Based on this analysis, it appears that coordinated computerized traffic signal control will result in higher northbound traffic volume throughput.

Table 1
Lake Street Traffic Volume Summary
PM Peak Hour (4:45-5:45)

Count Date	Day	Police Control	NB	SB	Total
			Towards Mass Ave	Towards Rt. 2	
6/9/2015	Tuesday	NO	543	555	1098
6/11/2015	Thursday	NO	549	561	1110
Average			546	558	1104
6/16/2015	Tuesday	YES	588	514	1102
6/18/2015	Thursday	YES	629	553	1182
Average			609	534	1143

Brooks Avenue Traffic Volumes

One concern expressed about a possible impact of the proposed signal at the Bikeway was a potential increase in traffic on Brooks Avenue. The concern was that increased throughput on Lake Street at the Bikeway would result in longer queues and increased delay on Lake Street at Mass Avenue. Drivers headed to Mass Avenue eastbound might seek to avoid the longer queues by turning right onto Brooks Avenue eastbound from Lake Street to find a quicker, alternative route to reach Mass Avenue headed toward Cambridge.

The study included recording traffic volumes on Brooks Avenue, east and west of Lake Street, to determine if there were any significant changes in traffic volumes during police officer control at the Bikeway. Table 2 shows average PM peak period (4:00 – 7:00) traffic volumes on Brooks Avenue by direction with and without police officer control. Eastbound traffic on Brooks Avenue east of Lake Street experienced a small increase of 8 vehicles with police officer control over the three hour period analyzed. Westbound traffic showed a slightly larger increase of 12 vehicles (6 percent increase with police officer control). West of Lake Street, westbound traffic increased by an average of 9 vehicles per hour. By percentage, the biggest impact on Brooks Avenue was 6 percent, which is considerably less than the 11 percent (peak hour) impact on Lake Street flow (described above), which indicates that the impact on Brooks Avenue traffic was commensurate with the overall increase of flow in the Lake Street corridor (at worst) and there was no evidence that more drivers were diverting onto Brooks Avenue to avoid queues on Lake Street approaching Mass Ave.

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
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Table 2
Brooks Avenue Average Traffic Volume Comparison
PM Peak Period (4:00-7:00)

Police Officer Control	East of Lake Street			West of Lake Street		
	Eastbound	Westbound	Total	Eastbound	Westbound	Total
No*	466	204	670	387	260	647
Yes**	<u>474</u>	<u>216</u>	<u>690</u>	<u>347</u>	<u>287</u>	<u>634</u>
Difference	+8	+12	+20	-40	+27	-13

* 6/8 - 6/11/15

** 6/15 – 6/18/15

Bikeway Volumes and Delay Crossing Lake Street

Table 3 summarizes the volume of bikeway users crossing Lake Street on Tuesday, June 9; Thursday, June 11 without police officer control; and Tuesday, June 16; and Thursday, June 18, 2015 between 4:30 and 6:30 PM with police officer control.

The results show an average of 754 Bikeway user crossings (536 to Arlington Center and 218 towards Alewife) on the days without police officer control. This represents an average of over six Bikeway users crossing Lake Street every minute between 4:30 and 6:30 PM. Bikeway users experienced little or no delay crossing Lake Street without police officer control as motorists typically stop to yield the right-of-way to Bikeway users (regardless of travel mode).

The table shows a total of 503 Bikeway crossings on June 16 (374 to Arlington Center and 129 to Alewife Station) with police officer control. It is important to note that it rained on June 16, and that the weather forecast was for heavy rain. This appeared to reduce the number of Bikeway users for this day. Weather was clear on June 18 and there were 771 crossings (533 to Arlington Center and 238 towards Alewife) with police officer control. This represents over six Bikeway crossings per minute, or about one every 10 seconds.

The minimum delay for Bikeway users crossing Lake Street with police officer control was 0 seconds, when they arrived during a “red” signal indication for Lake Street traffic. The maximum delay was 40 seconds, when bikeway users arrived at beginning of a “green” signal indication for Lake Street traffic. The average delay for all Bikeway crossings with police officer control was approximately 18 seconds. The results show that on a typical clear weather weekday over 700 Bikeway users crossed Lake Street during the two-hour PM peak period both without and with police officer control.

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
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January 13, 2016

Table 3
Lake Street Bikeway Crossing Volumes
PM Peak Period (4:30-6:30)
June 2015

Count Date	Day	Police Control	To Alewife	To Arlington Center	Total	Average Bikeway Delay (secs)	Notes
6/9/2015	Tuesday	NO	216	517	733	0	
6/11/2015	Thursday	NO	220	554	774	0	
Average			218	536	754	0	
6/16/2015	Tuesday	YES	129*	374*	503*	19	*Rain
6/18/2015	Thursday	YES	238	533	771	18	
Average			184	454	637	18	



Bikeway Users Crossing Lake Street with Police Officer Control, June 2015

Lake Street Travel Times and Queue Lengths

Table 4 compares the vehicle travel time results recorded on Lake Street northbound without police officer control on Tuesday, June 9 and Thursday, June 11, 2015 with travel times with police officer control present on Tuesday, June 16 and Thursday, June 18, 2015 between 4:30 and 6:30 PM.

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
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January 13, 2016

The results show that without police officer control, the time for a vehicle to travel from Route 2 to Mass Ave on Lake Street during the afternoon peak period ranged between 10 and 24+ minutes, with an average travel time over 16½ minutes (16:43). With police officer control, travel times ranged between 8 and 20 minutes with an average travel time of approximately 12 ½ minutes. The results show that travel times were about 4 minutes faster on average with police officer control.

Northbound vehicle queues on Lake Street were recorded during the travel time surveys in the afternoon peak period. The northbound vehicle queue on Lake Street typically extended from the Bikeway to under Route 2 and onto the Route 2 eastbound off-ramp with and with police officer control. However, the progression of northbound traffic flow on Lake Street was different without and with police officer control. Without police control, vehicles progressed incrementally northbound toward Mass Avenue. With police control, vehicles progressed in platoons as the simulated signal at the bikeway alternated between “green” and “red” phases. Vehicles traveling in platoons generally provide more predictability to motorists.

Table 4
Lake Street Vehicle Travel Time Runs
PM Peak Period (4:30-6:30)
June 2015

Date	Day	Police Control	# Runs	Travel Time (min:sec)*		
				Shortest	Longest	Average of total runs
6/9/2015	Tuesday	No	4	14:14	24:42	19:24
6/11/2015	Thursday	No	5	10:16	19:20	14:02
Average			4.5	12:15	22:01	16:43
6/16/2015	Tuesday	Yes	7	8:03	14:36	12:05
6/18/2015	Thursday	Yes	6	9:00	20:00	12:50
Average			6.5	8:32	17:18	12:28
Difference^				-3:43	-4:43	-4:15

* Travel time from Route 2 EB over Lake Street onto Mass Ave, about 1.2 miles

^ Days with police officer control minus days without police officer control

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT
ARLINGTON TRANSPORTATION ADVISORY COMMITTEE
January 13, 2016

Crash Data

Crash data for Lake Street between January 1, 2014 and December 31, 2015 were analyzed for this report. During that period, the Arlington Police Department responded to a total of 82 crashes on Lake Street. The vast majority of these crashes were at the intersection of Lake Street and Mass Ave.

Fourteen of the reported crashes on Lake Street occurred at the Bikeway crossing. Two of the crashes at the Bikeway involved pedestrians. There were no crashes at the Bikeway involving a bicyclist. Five crashes resulted in personal injury while seven crashes involved property damage only. It appears that the most common crash occurring at the Bikeway involved cars stopping for either cyclists or pedestrians crossing Lake Street and getting rear ended.

Observations

- With police officer control at the Bikeway crossing, the vehicle queue on northbound Lake Street traveled in large platoons, similar to what one would expect with a traffic signal versus stop-and-go traffic flow associated with the current unsignalized crossing.
- For some simulated “signal” cycles, southbound vehicles on Lake Street queued back through the Brooks Avenue intersection and onto the Brooks Avenue westbound approach (i.e., westbound left-turning cars from Brooks Avenue had nowhere to go). The queue dissipated once the police officers began allowing Lake Street southbound traffic to proceed at the Bikeway when there was an exclusive pedestrian signal at Brooks Avenue.
- Police officers could not fully replicate the operation of a coordinated computerized signal system. A traffic signal system would operate more efficiently by:
 - Allocating additional “green time” to Lake Street traffic when there is a pedestrian phase at Brooks Avenue and when there are no users waiting to cross Lake Street at the Bikeway; and
 - Minimizing the off-set time between the Bikeway and Brooks Avenue. The measured time it took northbound Lake Street vehicles to reach Brooks Avenue was approximately 14 seconds. A signal would give a green indication to northbound Lake Street vehicles at the Bikeway prior to the green indication for Lake Street at Brooks Avenue. This would result in less lost green time between the signals (approximately 6 seconds).
- Northbound and southbound vehicles on Lake Street making left turns into side streets (Lakehill Avenue and Margaret Street) often blocked through traffic on Lake Street.

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT

ARLINGTON TRANSPORTATION ADVISORY COMMITTEE

January 13, 2016

- Northbound motorists on Lake Street were observed making a left turn onto Lakehill Avenue to avoid delays (by traveling on Hamilton Road and Linwood Street to travel westbound on Mass Avenue.
- The northbound Lake Street queue at Mass Ave did not extend back Brooks Avenue.
- Many Bikeway users stopped at Lake Street with police officer control verbally indicated support for the installation of a signal.

CONCLUSIONS

As requested by the Arlington Board of Selectmen, the Arlington Transportation Advisory Committee (TAC) conducted an evaluation of the Lake Street corridor to measure the potential impact of a new traffic/pedestrian/bicycle signal at the Bikeway crossing on operations and safety. New transportation data were collected in the study corridor between Thursday, June 4 and Friday, June 19, 2015. Arlington Police officers simulated a traffic/pedestrian/bicycle signal at Lake Street and the Bikeway crossing between Monday, June 15, and Thursday June 19, 2015 between 4:00 and 7:00 PM. Traffic, pedestrian and bikeway volumes and delay for the weekday PM peak period were compared for the current condition (without police control) to the simulated traffic signal condition (with police control). The study findings include the following:

- During the weekday PM peak hour (4:45-5:45), Lake Street experiences between 1,100 and 1,200 vehicles per hour.
- Almost 400 users on the Bikeway cross Lake Street during the PM peak hour on a weekday, an average of more than six persons crossing every minute.
- Traffic volume on northbound Lake Street at Brooks Avenue during the PM peak period (4:30-5:30) was 10 to 15% higher with police officer control. Higher traffic volume flow rates were observed for short periods.
- Bikeway users crossing Lake Street with police officer control during the weekday PM peak period experienced stopped delay between 0 and 40 seconds, with an average delay between 15 and 20 seconds per crossing.
- Vehicle travel times on Lake Street between Route 2 and Mass Avenue during the weekday PM peak period were about 4 minutes faster on average with police officer control.
- The vehicle queue lengths on northbound Lake Street during the weekday PM peak period were similar for both the current condition (without police control) and for the simulated traffic signal

LAKE STREET CORRIDOR PROJECT – MANUAL SIGNAL SIMULATION TEST REPORT

ARLINGTON TRANSPORTATION ADVISORY COMMITTEE

January 13, 2016

condition (with police control). However, with police control the vehicles progressed in platoons versus stop-and-go operation with the current unsignalized condition.

- There were 14 crashes at the Bikeway crossing of Lake Street reported between January 1, 2014 and December 31, 2015. Two of the crashes involved pedestrians, five crashes resulted in personal injury and seven crashes involved property damage only. The most common type of crash at the Bikeway was rear end collisions.
- A new traffic/pedestrian/bicycle signal on Lake Street at the Bikeway would provide a modest improvement in traffic delay and vehicle travel time during weekday peak hours. During off-peak and weekend periods the travel benefits to traffic would be less noticeable. Bikeway users would experience a signal controlled crossing of Lake Street with average delays of up to 20 seconds.
- The signal would provide a more orderly, predictable crossing for both Bikeway and Lake Street users.

THE BOARD VOTED TO TABLE THESE RECOMMENDATIONS
PENDING FURTHER STUDY FROM TAC



TRANSPORTATION ADVISORY COMMITTEE

Arlington Planning Department, 730 Mass Ave,
Arlington MA, c/o Laura Wiener

To: Board of Selectmen, Arlington, MA

From: Transportation Advisory Committee (TAC)

Subject: Lake Street Corridor Transportation Concerns

Reference: Letters of September 20 and October 21, 2011 from the Board of Selectmen

Date: December 18, 2014

After consideration of the Board's request as specified in the referenced letters, on September 20 and October 21, 2011, the TAC unanimously voted these Recommendations on December 10, 2014 for the Board of Selectmen's consideration:

- Install a new traffic signal at the 4-way intersection of Lake Street and Minuteman Bikeway. This will include traffic signal beacons on Lake Street and pedestrian countdown signals and bicycle signals on the Bikeway approaches.
- Form a Design Review Committee that will include members of DPW, APD, TAC, Walking in Arlington and ABAC to oversee the engineering design of the project.
- Coordinate signal phasing and timing between the Bikeway and the signal at Brooks Avenue and optimize signal timings.
- Install a new left turn arrow signal for the northbound Brooks Avenue approach to Lake Street.
- Widen the Bikeway in the immediate area of the intersection.
- Trim/remove vegetation to improve sight distance.

A Lake Street Corridor Transportation Analysis Report is provided with this submittal.

Respectfully submitted,

Jeff Maxtutis – Working Group Lead and Vice Chair
Howard Muise – TAC Chair

Transportation Advisory Committee Members:

Wayne Chouinard, Carey Conrad, Seth Federspiel, John Hurd, Melissa Laube, Jeff Maxtutis, Marjorie Moores,
Howard Muise, Officer Corey Rateau, Jeanette Rebecchi, Victor Rivas, Scott Smith, and Laura Wiener

Web site; www.arlingtonma.gov/tac



Town of Arlington, Massachusetts

Request for Statement of Support/Non-Opposition - Medical Marijuana Dispensary

Summary:

Massachusetts Patient Foundation

ATTACHMENTS:

Type	File Name	Description
<input type="checkbox"/> Backup Material	Draft_Community_Benefit_Agreement_with_Mass_Patient_Foundation_(00017812).pdf	Draft Community Benefit Agreement
<input type="checkbox"/> Document for Approval	Statement_of_Support_-_Non-Opposition.pdf	State Documentation of Support/Non-Opposition
<input type="checkbox"/> Backup Material	municipal-guidance_DPH.pdf	State Guidance for Municipalities
<input type="checkbox"/> Reference Material	Town_Counsel_Memo_RE_RMD_Request_for_Letter_for_Non-Opposition_or_Support_at_2.22.16_Meeting.pdf	Town Counsel Memorandum to Board
<input type="checkbox"/> Backup Material	Memo_Police_Chief_MMD.pdf	Memorandum to Board
<input type="checkbox"/> Backup Material	municipal-guidance_DPH.pdf	Memorandum to Board

HOST COMMUNITY AGREEMENT
ARLINGTON, MA
MASSACHUSETTS PATIENT FOUNDATION, INC.

THIS HOST COMMUNITY AGREEMENT (“Agreement”) is entered into pursuant to M.G.L. ch.44, §53A this _____ day of February, 2016 by and between MASSACHUSETTS PATIENT FOUNDATION, INC. a Massachusetts not-for-profit corporation with a principal office address of 36 Glen Ave., Newton, MA 02059 (“OPERATOR”) and the TOWN OF ARLINGTON, a Massachusetts municipal corporation with a principal address of 730 Mass Ave., Arlington, MA 02476 (“TOWN”).

WHEREAS OPERATOR wishes to locate a Registered Marijuana Dispensary dispensing facility (“RMD”) in the TOWN, in accordance with regulations issued by the Commonwealth of Massachusetts Department of Public Health (“DPH”);

WHEREAS OPERATOR intends to provide certain benefits to the TOWN by way of gift or grant in the event that it receives a Final Certificate of Registration to operate a RMD in the TOWN by the DPH;

WHEREAS OPERATOR has applied for a certificate of registration from the DPH to operate the RMD in the TOWN at 5-11 Water St., Arlington, MA 02476 (the “Facility”); and

WHEREAS OPERATOR is seeking a letter of support/non-opposition from the TOWN for the siting and operation of an RMD in the TOWN.

NOW, THEREFORE, in consideration of the above, OPERATOR offers and the TOWN accepts the following Agreement terms in accordance with M.G.L. ch.44 §53A:

1. OPERATOR shall pay to the TOWN 3% of the gross revenue received by OPERATOR from retail sales at the Facility accruing from the date of commencement of sales by OPERATOR in the TOWN (“Sales Commencement Date”). The initial payment to the TOWN shall be made on the first day of the seventh month after the Sales Commencement Date (“Initial Payment Date”), and shall reflect gross revenue for the first quarter of sales. Thereafter payments shall be made every six months, and shall reflect the subsequent six month’s sales,

with the final three months payment remaining unpaid until three months after the termination of this Agreement. OPERATOR shall notify the TOWN when OPERATOR commences dispensing within the TOWN. OPERATOR's records maintained pursuant to 105 CMR 725.105(I)(5) will be available to the TOWN upon request to verify OPERATOR's payment amounts. The TOWN may notify OPERATOR to delay the initial payment, in which case the initial payment shall be made as specified by the TOWN; however, the timing of subsequent payments shall be made as if the initial payment had been on the Initial Payment Date.

2. OPERATOR shall make a one-time payment to TOWN of \$100,000.00 within one week of the Sales Commencement Date, and the TOWN shall credit OPERATOR \$100,000.00 against OPERATOR's biannual payments.
3. OPERATOR shall work with the Arlington Police Department in determining the placement of exterior security cameras, so that at least two cameras are located to provide an unobstructed view in each direction of the public way(s) on which the RMD is located. OPERATOR will maintain a cooperative relationship with the Arlington Police Department, including but not limited to periodic meetings to review operational concerns, cooperation in investigations, and communication to Arlington Police Department of any suspicious activities on the site.
4. Except for senior management positions, OPERATOR commits to hiring local, qualified employees to the extent consistent with law. In addition to the direct hiring, OPERATOR will work in a good faith, legal and non-discriminatory manner to hire local vendors, suppliers, contractors and builders from the Arlington area where possible.
5. OPERATOR shall cooperate fully with the TOWN to prevent "Hardship Cultivation Registrations" as defined by 105 CMR 725.104 & 105 CMR 725.035, including but not limited to OPERATOR's commitment to delivering to residents of the TOWN unless such deliveries are prevented by circumstances outside of the OPERATOR's control.

6. The purpose of this Agreement is to assist the TOWN in addressing any public health, safety and other effects or impacts the RMD may have on the TOWN. The TOWN shall use the above-referenced payments in its sole discretion consistent with the purpose of the Agreement.
7. This Agreement shall terminate at the time that either of the following occur:
 - a. the TOWN notifies OPERATOR of the TOWN's termination of this Agreement;
 - b. OPERATOR ceases to operate a RMD in the TOWN
8. The obligations of OPERATOR and the TOWN recited herein are specifically contingent upon the issuance by DPH to OPERATOR of a Final Certificate of Registration for the operation of a RMD facility in the TOWN, and OPERATOR obtaining all required approvals from the TOWN for the OPERATOR to serve patients and caregivers from the Facility in Town.
9. OPERATOR shall not assign, sublet or otherwise transfer this Agreement, in whole or in part, without the prior written consent of the TOWN and shall not assign any of the moneys payable under this Agreement, except with the written consent of the TOWN, provided, however, that a pledge or assignment of assets, profits or receivables required in connection with financing the business by OPERATOR shall not be considered an assignment for the purposes of this paragraph.
10. This Agreement is binding upon the parties hereto, their successors, assigns and legal representatives. Neither the TOWN nor OPERATOR shall assign or transfer any interest in the Agreement without the written consent of the other.
11. OPERATOR shall comply with all laws, rules, regulations and orders applicable to the operation of an RMD, such provisions being incorporated herein by reference, and shall be responsible for obtaining all necessary licenses, permits, and approvals required for the operation of an RMD.

12. Any and all notices, or other communications required or permitted under this Agreement, shall be in writing and delivered by hand or mailed postage prepaid, return receipt requested, by registered or certified mail or by other reputable delivery service, to the parties at the addresses set forth on Page 1 or furnished from time to time in writing hereafter by one party to the other party. Any such notice or correspondence shall be deemed given when so delivered by hand, if so mailed, when deposited with the U.S. Postal Service, or if sent by private overnight or other delivery service, when deposited with such delivery service.
13. If any term or condition of this Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by the court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.
14. This Agreement shall be governed by, construed and enforced in accordance with the laws of the Commonwealth of Massachusetts and OPERATOR submits to the jurisdiction of the Trial Court for Middlesex County for the adjudication of disputes arising out of this Agreement.

[REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK]

15. This Agreement, including all documents incorporated herein by reference, constitutes the entire integrated Agreement between the parties with respect to the matters described. This Agreement supersedes all prior agreements, negotiations and representations, either written or oral, and it shall not be modified or amended except by a written document executed by the parties hereto.

TOWN OF ARLINGTON, BOARD OF
SELECTMEN OR TOWN MANAGER:

MASSACHUSETTS PATIENT
FOUNDATION INC.

By: _____

Title: _____

SECTION C: LETTER OF SUPPORT OR NON-OPPOSITION

Attach a letter of support or non-opposition, **using one of the templates below (Option A or B)**, signed by the local municipality in which the applicant intends to locate a dispensary. The applicant may choose to use either template, in consultation with the host community. If the applicant is proposing a dispensary location and a separate cultivation/processing location, the applicant **must** submit a letter of support or non-opposition from **both** municipalities. This letter may be signed by (a) the Chief Executive Officer/Chief Administrative Officer, as appropriate, for the desired municipality; or (b) the City Council, Board of Alderman, or Board of Selectmen for the desired municipality. **The letter of support or non-opposition must contain the language as provided below. The letter must be printed on the municipality's official letterhead.**

Template Option A: Use this language if signatory is a Chief Executive Officer/Chief Administrative Officer

I, [Name of person], do hereby provide [support/non-opposition] to [name of non-profit organization] to operate a Registered Marijuana Dispensary ("RMD") in [name of city or town].

I have verified with the appropriate local officials that the proposed RMD facility is located in a zoning district that allows such use by right or pursuant to local permitting.

Name and Title of Individual

Signature

Date

Template Option B: Use this language if signatory is acting on behalf of a City Council, Board of Alderman, or Board of Selectman

The [name of council/board], does hereby provide [support/non-opposition] to [name of non-profit organization] to operate a Registered Marijuana Dispensary in [name of city or town]. I have been authorized to provide this letter on behalf of the [name of council/board] by a vote taken at a duly noticed meeting held on [date].

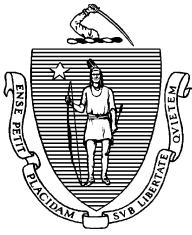
The [name of council/board] has verified with the appropriate local officials that the proposed RMD facility is located in a zoning district that allows such use by right or pursuant to local permitting.

Name and Title of Individual (or person authorized to act on behalf of council or board) *(add more lines for names if needed)*

Signature *(add more lines for signatures if needed)*

Date

Information on this page has been reviewed by the applicant, and where provided by the applicant, is accurate and complete, as indicated by the initials of the authorized signatory here: _____



CHARLES D. BAKER
Governor

KARYN E. POLITO
Lieutenant Governor

The Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Public Health
Bureau of Health Care Safety and Quality
Medical Use of Marijuana Program

99 Chauncy Street, 11th Floor, Boston, MA 02111

MARYLOU SUDDERS
Secretary

MONICA BHAREL, MD, MPH
Commissioner

Tel: 617-660-5370
www.mass.gov/medicalmarijuana

Guidance for Municipalities Regarding the Medical Use of Marijuana
Updated August 2015

The following information is provided to assist municipalities in addressing questions related to the marijuana for medical use. Additional information is available on our website at mass.gov/medicalmarijuana or by contacting our support center at (617) 660-5370 or medicalmarijuana@state.ma.us.

Department of Public Health Regulations & Local Laws or Regulations

Role of Municipalities. The Department of Public Health Regulations, 105 CMR 725.000, et. seq. (the “Regulations”)¹ implementing the Humanitarian Medical Use of Marijuana Act, Ch. 369 of the Acts of 2012 (the “Act”)² recognize the role of municipalities in adopting local laws and regulations regarding uses related to marijuana for medical use that are appropriate for their community.

Local Option. The Department does not, however, mandate any involvement by municipalities or local boards of health in the regulation of registered marijuana dispensaries (“RMDs”), qualifying patients with hardship cultivation registrations, or any other aspects of marijuana for medical use. 105 CMR 725.600(B).

Compliance with Local Law. The Regulations require RMDs and all other persons registered with the Medical Use of Marijuana Program to comply with all local ordinances, bylaws and regulations. 105 CMR 725.600(A). Nothing in the Regulations will be construed to prohibit lawful local oversight and regulation that does not conflict or interfere with the operation of 105 CMR 725.000. 105 CMR 725.600(B). For example, 105 CMR 725.110(A)(11) requires that an RMD must “[e]nsure that trees, bushes, and other foliage outside of the RMD do not allow for a person or persons to conceal themselves from sight...” Local ordinances or bylaws may not require landscaping that would conflict with this provision.

The Attorney General’s Office has issued decisions regarding bylaws or ordinances that it believes to conflict with state law, including a bylaw attempted to prohibit RMDs, a bylaw requiring all registered qualified patients within a municipality to register with the municipality, bylaws requiring personal caregivers or anyone engaged in home cultivation to register with local officials who are not law enforcement personnel, bylaws requiring a special permit for home cultivation, bylaws limiting home cultivation to a particular area in the community, bylaws prohibiting home delivery, bylaws requiring buffer zones around home cultivation sites, and bylaws requiring RMDs to comply with federal law. For

¹ <http://www.mass.gov/eohhs/docs/dph/regs/105cmr725.pdf>

² <https://malegislature.gov/Laws/SessionLaws/Acts/2012/Chapter369>

more information on the decisions of the Attorney General's Office regarding bylaws or ordinances regarding marijuana for medical use, please consult the website for the Attorney General's Office at <http://www.mlu.ago.state.ma.us/>.

Municipalities must use their best judgment in crafting local requirements, so as not to create a conflict with 105 CMR 725.000. When in doubt, the municipality should consult its Town Counsel or City Solicitor.

Buffer Zone. One opportunity for municipalities to exercise local control over the placement of RMDs in their community is the setting of a buffer zone. The Regulations, 105 CMR 725.110(A)(14), state:

A RMD shall comply with all local requirements regarding siting, provided however that if no local requirements exist, a RMD shall not be sited within a radius of five hundred feet of a school, daycare center, or any facility in which children commonly congregate. The 500 foot distance under this section is measured in a straight line from the nearest point of the facility in question to the nearest point of the proposed RMD.

The Department measures the distance from building to building rather than property line to property line. A facility is not, however, limited to a building. For example, a playground outside a school would be considered a facility where children congregate, so in that case the line would be measured from the edge of the playground to the nearest point of the building that would house the potential RMD. If a municipality enacts its local bylaw or ordinance regarding the buffer zone, it may also determine its own standard of measure.

The Department interprets a "facility in which children commonly congregate" to include facilities in which children are gathered for a particular purposes in a structured and scheduled manner or which are dedicated to the use of children, such as playgrounds, youth services programs, day care centers, youth sports facilities, dance schools, and gymnastic schools. It includes a private home housing a family day care center, but not a private home where children happen to live. It does not include other facilities, such as ice cream shops, where children may happen to congregate, but not in a structured, scheduled manner.

Municipalities may set their own buffer zone, but if they do not, the default buffer zone will be the 500 foot distance described in the Regulations.

Local Permitting. Municipalities are not required to wait for DPH to issue an RMD a Provisional Certificate of Registration before acting on local permit applications, but may elect to require an RMD to demonstrate that it has received such a registration first. Please note, however, that under the Regulations, 105 CMR 725.100(B)(5)(f), an RMD must submit architectural plans to the Department prior to construction or renovation of an RMD. Proceeding with construction or renovation without Department approval is done at the applicant's risk and any construction or renovation already performed may need to be changed at the applicant's expense.

Registered Marijuana Dispensaries

Vertically-Integrated System. In Massachusetts, the RMDs are required to be "vertically-integrated," which means RMDs grow and process their own marijuana, with limited exceptions, rather than purchasing marijuana from a supplier.

Non-Profit Requirement. Only an entity that is incorporated in Massachusetts as a non-profit corporation under M.G.L. c. 180 can apply to operate an RMD.

Retail v. Cultivation. An RMD may have a retail facility, as well as cultivation and processing operations. Some RMDs elect to do cultivation, processing and retail operations all in one location, which is commonly referred to as a “co-located” operation. An RMD may also choose to have a retail dispensary in one location and grow marijuana at a remote cultivation location. It may conduct the processing of the marijuana at either the retail dispensary location or the remote cultivation location. The remote cultivation location need not be in the same municipality or even the same county as the retail dispensary.

Multiple RMDs. A non-profit corporation may operate up to 3 RMDs. The retail dispensaries of one non-profit corporation may share a remote cultivation facility. Different non-profit corporations may not, however, share a remote cultivation facility with each other.

Amount of Marijuana. There is no specified numeric maximum amount that an RMD may have on its premises. The Regulations require that RMDs must limit their inventory of seeds, plants, and useable marijuana to reflect the projected needs of registered qualifying patients. 105 CMR 725.105(G)(1).

Number of RMDs per Municipality. It is up to a municipality to determine how many RMDs it deems appropriate for the community. The municipality may express that determination through granting or denying a request by an applicant for a letter of support or non-opposition. An RMD will not be permitted to proceed to the Inspections Phase if it has not obtained a letter of support or non-opposition.

Taxation. The Department of Revenue (“DOR”) has determined that the sales tax exemption for prescription medicine in G.L. c. 64H, § 6(l) applies to sales of marijuana and products containing marijuana to a qualifying patient or the patient’s personal caregiver pursuant to a written certification by a licensed physician. Any other supplies, educational materials or other items sold by the medical marijuana treatment center are subject to tax unless another exemption applies. For further information, please consult the DOR website: <http://www.mass.gov/dor/businesses/help-and-resources/legal-library/directives/directives-by-years/2015-directives/dd-15-1.html>; or consult your Town Counsel or City Solicitor for further information.

Other Activities at an RMD. An RMD is defined as a non-profit entity “that acquires, cultivates, possesses, processes (including development of related products such as edible MIPs, tinctures, aerosols, oils, or ointments), transfers, transports, sells, distributes, dispenses, or administers marijuana, products containing marijuana, related supplies, or educational materials to registered qualifying patients or their personal caregivers.” An RMD is not a health care provider or a provider of general wellness services. Under the Regulations, 105 CMR 725.105(N)(7), an RMD may not sell any products other than marijuana, marijuana-infused products (MIPs), marijuana seeds, and other products such as vaporizers that facilitate the use of marijuana for medical purposes. RMDs may, however, conduct a patient education program in compliance with the Regulations, 105 CMR 725.105(K).

Hours of Operation. The Regulations do not specify particular hours of operation. Municipalities may set reasonable requirements in this regard.

Home Delivery. The Regulations permit, but do not require, home delivery to registered qualifying patients and personal caregivers within the Commonwealth.

Limitations on Entry. Only registered qualifying patients, personal caregivers, dispensary agents and authorized state and local officials may enter an RMD, with strictly limited exceptions.

Patient Choice. Qualifying patients may choose to purchase from different dispensaries from around the Commonwealth. RMDs are required to track purchases in the Medical Use of Marijuana Online

Registration System so that patients are not permitted to purchase more than the amount their physician has certified as appropriate for their debilitating medical condition.

Coordination with local law enforcement. The Regulations require RMDs to coordinate with local enforcement regarding panic alarms, providing hours of operation, after-hours contact information and access to RMD surveillance operations; as well as requiring dispensary agents to produce their Program ID Card to law enforcement upon request.

Certain issues must be reported to local law enforcement, often within 24 hours: diversion of marijuana; unusual discrepancies identified during inventory, theft, loss and any criminal action; unusual discrepancy in weight or inventory during transportation; any vehicle accidents, diversions, losses, or other reportable incidents that occur during transport; any suspicious act involving the sale, cultivation, distribution, processing, or production of marijuana by any person; unauthorized destruction of marijuana; any loss or unauthorized alteration of records related to marijuana, registered qualifying patients, personal caregivers, or dispensary agents; an alarm activation or other event that requires response by public safety personnel; failure of any security alarm system due to a loss of electrical power or mechanical malfunction that is expected to last longer than eight hours; and any other breach of security.

Ongoing Inspections. The Department will conduct ongoing inspections of RMDs after they open, including scheduled and unscheduled inspections. If local officials encounter issues with an RMD, they should contact the Medical Use of Marijuana Program at (617) 66-5370 or RMDcompliance@state.ma.us.

Annual Registration Renewal. RMDs are required to renew their registration annually with the Department.

The RMD Application Process

Overview. DPH will evaluate the applications received on or after June 29, 2015 on a rolling basis, with priority given to the review of applicants proposing to site an RMD in an Open County. Each successful applicant will be notified that they are authorized to proceed to the Inspection Phase, during which they may seek all required local permits, and when authorized by their community, commence building out the RMD. The Inspections Phase also includes evaluation of documentation prepared in compliance with the Regulations and guidance provided by the Department regarding the operation of a nonprofit RMD. After passing all applicable local and state inspections, an RMD may receive a Final Certificate of Registration.

Role of Municipalities. Municipalities should determine what local permits or licenses may be required if a RMD wishes to locate there, and consult their Town Counsel or City Solicitor if there are any questions about the required process.

Proposed Locations. As part of the application process, an RMD applicant will submit an *Application of Intent*, a *Management and Operations Profile*, and a *Siting Profile* in sequential order. An applicant must be formally invited by the Department in writing in order to submit a *Management and Operations Profile* or *Siting Profile*. An RMD applicant does not inform the Department of their proposed RMD location(s) until the time of submission of the *Siting Profile*.

Letters of Support or Non-Opposition. RMDs may approach municipal officials to acquire letters of local support or non-opposition, which is required for the *Siting Profile* portion of the application. An RMD is required to obtain a letter of support or non-opposition from its host community before it will be

permitted to proceed to the Inspection Phase. In terms of the evaluation, there is no difference between a letter of support or a letter of non-opposition. Either letter will satisfy the requirement.

If the applicant is proposing a retail dispensary location and a remote cultivation facility, the applicant must submit a letter of support or non-opposition from both municipalities. This letter may be signed by (a) the Chief Executive Officer/Chief Administrative Officer, as appropriate, for the desired municipality; or (b) the City Council, Board of Alderman, or Board of Selectmen for the desired municipality. The applicant's choice of (a) or (b) should be done in consultation with the host community. Each letter requires that particular language be included in the letter, as provided in Section C of the *Siting Profile*. If the applicant and the host community choose (b), please note that the template language requires the signor to state that there was a vote to sign the letter taken at a duly noticed meeting and to identify the date of that meeting.

Notification of Municipality. After receiving an invitation to submit a *Management and Operations Profile*, the applicant must Notify the chief administrative officer, or equivalent, and chief of police, or equivalent, of the proposed city or town in which an RMD would be sited, if applicable, and the sheriff of the applicable county, of the intent to submit a *Management and Operation Profile* and a *Siting Profile*.

Municipal Approval Prior to Opening. Before an RMD can open, it must comply with all local rules, regulations, ordinances and bylaws, in addition to all applicable state laws.

Home Cultivation

Eligibility: The Regulations allow for home cultivation, also known as “hardship cultivation” when a qualifying patient meets at least one of three criteria:

- Verified financial hardship;
- Physical incapacity to access reasonable transportation;
- Lack of an RMD within a reasonable distance.
-

Until the Department announces the registration of home or hardship cultivators, qualifying patients and personal caregivers are permitted to engage in limited cultivation in compliance with the Regulations.

Where. Home cultivation may only occur at either the qualifying patient's or personal caregiver's primary residence, but not both.

How. Cultivation and storage must occur in an enclosed, locked area, not visible for the street or other public areas. Only an amount sufficient to provide the qualifying patient with a sixty day supply may be cultivated.

Online Registration System

Who. The Online Registration System provides online certification and registration for qualifying patients, as well as registration for physicians, personal caregivers and dispensary agents. Pediatric patients are registered through a paper process.

Accessible. The Online Registration System allows access for law enforcement 24 hours a day, 7 days a week.

Verification. The Online Registration System allows law enforcement to verify that an individual may legally possess marijuana.

Real-Time. The Online Registration System allows real-time updates of certification and registration information.

Secure. The Online Registration System has appropriate security and access limitations to protect sensitive or confidential information.

Additional Information. Further information regarding the Online Registration System may be found on the Medical Use of Marijuana Program website:

<http://www.mass.gov/eohhs/gov/departments/dph/programs/hcq/medical-marijuana/patients-and-caregivers.html>.

Public Records

Protection of RMD Security Information. Municipalities may receive information about RMDs in the course of the local permitting process that may compromise the RMD if disclosed.

Municipalities may refer to exemption (n) to the definition of “public records” in M.G.L. c. 4, s. 7, which provides that the following are exempt from disclosure as public records:

“(n) records, including, but not limited to, blueprints, plans, policies, procedures and schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or vulnerability assessments, or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation or other infrastructure located within the commonwealth, the disclosure of which, in the reasonable judgment of the record custodian, subject to review by the supervisor of public records under subsection (b) of section 10 of chapter 66, is likely to jeopardize public safety.”

Municipalities should consult with their Town Counsel or City Solicitor regarding Public Records laws and use their best efforts to keep confidential any information that, if released, may jeopardize public safety.



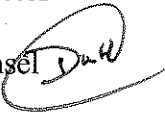
**Town of Arlington
Legal Department**

Douglas W. Heim
Town Counsel

50 Pleasant Street
Arlington, MA 02476
Phone: 781.316.3150
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E-mail: dheim@town.arlington.ma.us
Website: www.arlingtonma.gov

To: Board of Selectmen

Cc: Adam Chapdelaine, Town Manager
Christine Bongiorno, Director of Health & Human Services
Fred Ryan, Police Chief
Michael Byrne, Building Inspector

From: Douglas W. Heim, Town Counsel 

Date: February 18, 2016

Re: Request for Approval of Letter of Non-Opposition by Massachusetts Patient Foundation

Members of the Board, it is my understanding that the Massachusetts Patient Foundation, Inc., a registered non-profit incorporated in Massachusetts requests a letter of support or alternatively, a letter of non-opposition, from the Board of Selectmen with respect to their intention to site and operate a Registered Marijuana Dispensary ("RMD") within the Town of Arlington. Accordingly, while the Board will recall that representatives of the Patient Foundation ("MPF") presented the Board with materials supporting their proposal at the October 19, 2015 Board meeting, and the legal parameters of RMD's were discussed, I write to provide you further information to aide your examination of MPH's request.

Legal Background

As the Board may recall, by November 2012 state-wide ballot question, the voters of the Commonwealth approved medical marijuana possession and use by certain qualified patients. The ensuing law, Chapter 369 of the Acts of 2012, and Department of Public Health ("DPH") regulations, 105 CMR 725, allow individuals with written appropriate medical authorization to obtain, possess, and use up to a 60-day supply of marijuana. Absent specific conditions such as

“hardship” as defined by DPH regulations, the State contemplates that up to 35 dispensaries (between 1 and 5 in each county of the Commonwealth) will be licensed to sell medical marijuana to these registered medical users. DPH developed a robust licensing process for RMDs, in which obtaining a letter of non-opposition or support from local executive bodies is a pre-requisite to eligibility. Accordingly, the Board’s support or non-opposition to MPH’s request is a necessary, but not sufficient step for MPH to open an RMD at their proposed location.

Local Laws, DPH Regulations & Siting Matters

In sum, the key points to bear in mind in terms of Arlington’s local authority over RMDs and marijuana use are the following:

- Arlington may not institute a blanket prohibition on either the use of medical marijuana, or on the siting and operation of any RMDs. It may exercise some control over the location of RMDs, which it has done by limiting RMDs to special permits in B3 and B5 zoned areas. To the extent Arlington does not have an a dispensary, it could provide some grounds for home cultivation.
- One means of qualifying for “hardship cultivation” under 105 CMR 725.035(3) is the “[l]ack of an RMD within a reasonable distance of the patient's residence and lack of an RMD that will deliver marijuana to the patient's or personal caregiver's primary address.”

At this juncture, the nearest retail RMD in operation is in Brookline, with additional operating retail RMDs in Ayer, Brockton, Lowell, Northhampton and Salem. To my knowledge, Boston has at least one proposed RMD presently working with DPH on its license.

As such, it is possible that some registered patient Arlington residents could currently claim hardship cultivation depending on their circumstances, though that likelihood would decrease if immediately neighboring communities sited an RMD.

- Neither Chapter 369 of the Acts of 2012 or DPH regulations permit the public use of marijuana, which constitutes a violation of Title VIII, Article 7 of the Town Bylaws and is punishable by a \$300 fine.
- The Board of Health has the authority, but is not mandated, to issue reasonable regulations with respect to RMDs consistent with state law. It is my understanding that the Board of Health has drafted regulations and the Director of Health and Human Services will be available to discuss such regulations with you.
- Absent local regulations altering the “buffer zone” with respect to siting, DPH requires RMDs not be “sited within a radius of five hundred feet of a school, daycare center, or any facility in which children commonly congregate. The 500 foot distance under this

section is measured in a straight line from the nearest point of the facility in question to the nearest point of the proposed RMD.” 105 CMR 725.110(A)(14).

To date, DPH has interpreted this requirement to include facilities dedicated to the use of children such as dance schools or gymnastics schools, but not other locations where children may frequently congregate but not in structured, heavily scheduled fashion.

For further information, please see the August 2015 “Guidance for Municipalities Regarding the Medical Use of Marijuana” from DPH attached hereto as reference material. It is my understanding that at present there are no schools, daycares or other qualifying facilities operating within 500 feet of the proposed site.

MPH-Arlington and Community Benefit Agreement

As the Board will recall, for the purposes of considering MPH’s request, the Town negotiated a draft contingent Community Benefit Agreement with MPH, outlining certain payments to the Town in the event the Board approves a letter of non-opposition or support for an RMD. These payments are intended to assist the Town in addressing public health, safety, or other concerns which may arise due to the operation of an RMD. Accordingly, such payments are only made upon the RMD obtaining all the necessary certificates, licenses and permits from DPH and other appropriate entities necessary for MPH to operate.

While there are still many uncertainties in the law with respect to the relationship and conflicts between federal and state laws on medical marijuana, the agreement would first and foremost be subject to interpretation under Massachusetts law. As such, the validity and enforceability of any Community Benefit Agreement presents low risk to the Town.

Substantively, the Benefit Agreement is structured very similarly to agreements in other communities where RMDs have opened, and contains competitive terms with respect to the payments to be made to the Town.

Future Regulation and Recreational Marijuana Initiatives

At present, a single ballot initiative with respect to legalizing recreational marijuana in the Commonwealth is to be inserted for voters’ consideration on the 2016 state-wide ballot. “The Initiative Petition for a Law Relative to the Regulation and Taxation of Marijuana,” proposes to regulate marijuana on terms similar to the regulation of alcohol in Massachusetts, including establishing a “Cannabis Control Commission” very similar to the Alcoholic Beverage Control Commission (“ABCC”), includes a proposed state tax rate and local tax option, which would not apply to medical marijuana sales. The proposal, if successful, would similarly permit local regulation of marijuana sales consistent with state law. It would also give modest preference in licensing to RMDs by allowing them to apply for licensure before prospective purveyors without an existing license to sell medical marijuana to registered patients.

REFERENCE MATERIALS

Town Bylaws Title VIII Article 7: **Public Consumption of Marihuana or Tetrahydrocannabinol**

(ART. 16, ATM – 05/04/09)

Section 1.No Public Consumption.

No person shall smoke, ingest, or otherwise use or consume marihuana or tetrahydrocannabinol (as defined in General Laws Chapter 94C, Section 1, as amended) while in or upon any street, sidewalk, public way, footway, passageway, stairs, bridge, park, playground, beach, recreation area, boat landing, public building, schoolhouse, school grounds, cemetery, parking lot, or any area owned by or under control of the Town, or in or upon any bus or other passenger conveyance operated by a common carrier within the Town, or in any place accessible to the public within the Town.

Section 2.Violation and Penalties. (Amended ART 18, ATM 2010)

Violation of Section 1 is punishable by a fine of \$300, enforceable through criminal indictment or complaint under General Laws Chapter 40, Section 21 or by non-criminal disposition under Gen Laws Chapter 40, Section 41D. Any penalty imposed under this Bylaw shall be in addition to any civil penalty imposed under G.L. c. 94C, § 32L.

Key Provisions of DPH Regulations 105 CMR 725

725.035: Hardship Cultivation Registration

(A) A qualifying patient registered with the Department pursuant 105 CMR 725.015 may apply for a hardship cultivation registration if such patient can demonstrate that his or her access to an RMD is limited by:

- (1) Verified financial hardship; or
- (2) Physical incapacity to access reasonable transportation, as demonstrated by an inability to use public transportation or drive oneself, lack of a personal caregiver with a reliable source of transportation, and lack of an RMD that will deliver marijuana to the patient's or personal caregiver's primary address; or
- (3) Lack of an RMD within a reasonable distance of the patient's residence and lack of an RMD that will deliver marijuana to the patient's or personal caregiver's primary address.

725.100: Registration of Registered Marijuana Dispensaries

(A) General Requirements.

- (1) An RMD is required to incorporate pursuant to M.G.L. c. 180 and to maintain the corporation in good standing with the Secretary of the Commonwealth. An RMD must operate on a non-profit basis for the benefit of registered qualifying patients. Such corporation must ensure that revenue of the RMD is used solely in furtherance of its non-profit purpose.
- (2) No executive, member, or any entity owned or controlled by such executive or member, may directly or indirectly control more than three RMDs.
- (3) An RMD must make vaporizers available for sale to registered qualifying patients.
- (4) An RMD may not have more than two locations in Massachusetts at which marijuana is cultivated, MIPs are prepared, and marijuana is dispensed. Each of these activities may occur at only one such location, which may be either the RMD's principal place of business or one Department-approved alternate location in Massachusetts, but not both.
- (5) All dispensary agents of the RMD must be registered pursuant to 105 CMR 725.030.

(6) An RMD must have a program to provide reduced cost or free marijuana to patients with documented verified financial hardship.

(7) At least one executive of a non-profit corporation seeking registration as an RMD must register with the Massachusetts Department of Criminal Justice Information Services (DCJIS) on behalf of the entity as an organization user of iCORI.

725.110: Security Requirements for Registered Marijuana Dispensaries

(A) General Requirements. An RMD shall implement sufficient security measures to deter and prevent unauthorized entrance into areas containing marijuana and theft of marijuana at the RMD. Security measures to protect the premises, registered qualifying patients, personal caregivers, and dispensary agents of the RMD must include but are not limited to the following. The RMD must:

- (1) Allow only registered qualifying patients, personal caregivers, dispensary agents, persons authorized by 105 CMR 725.105(P), and, subject to the requirements of 105 CMR 725.110(C)(4), outside vendors, contractors, and visitors, access to the RMD;
- (2) Prevent individuals from remaining on the premises of the RMD if they are not engaging in activity expressly or by necessary implication permitted by St. 2012, c. 369 and 105 CMR 725.000;
- (3) Dispose of marijuana in accordance with 105 CMR 725.105(J), in excess of the quantity required for normal, efficient operation as established in 105 CMR 725.105(G)(1);
- (4) Establish limited access areas accessible only to specifically authorized personnel, which shall include only the minimum number of employees essential for efficient operation;
- (5) Store all finished marijuana in a secure, locked safe or vault and in such a manner as to prevent diversion, theft, and loss;
- (6) Keep all safes, vaults, and any other equipment or areas used for the production, cultivation, harvesting, processing, or storage of marijuana and MIPs securely locked and protected from entry, except for the actual time required to remove or replace marijuana;
- (7) Keep all locks and security equipment in good working order;
- (8) Prohibit keys, if applicable, from being left in the locks, or stored or placed in a location accessible to persons other than specifically

authorized personnel; 5/24/13 105 CMR - 4160.11 105 CMR:
DEPARTMENT OF PUBLIC HEALTH 725.110: continued

(9) Prohibit accessibility of security measures, such as combination numbers, passwords, or electronic or biometric security systems, to persons other than specifically authorized personnel;

(10) Ensure that the outside perimeter of the RMD is sufficiently lit to facilitate surveillance;

(11) Ensure that trees, bushes, and other foliage outside of the RMD do not allow for a person or persons to conceal themselves from sight;

(12) Develop emergency policies and procedures for securing all product following any instance of diversion, theft, or loss of marijuana, and conduct an assessment to determine whether additional safeguards are necessary; and

(13) Develop sufficient additional safeguards as required by the Department for RMDs that present special security concerns.

(14) An RMD shall comply with all local requirements regarding siting, provided however that if no local requirements exist, an RMD shall not be sited within a radius of 50 feet of a school, daycare center, or any facility in which children commonly congregate. The 500 foot distance under this section is measured in a straight line from the nearest point of the facility in question to the nearest point of the proposed RMD.

725.600: Municipal Requirements

(A) An RMD and other registered persons shall comply with all local rules, regulations, ordinances, and bylaws.

(B) The Department does not mandate any involvement by municipalities or local boards of health in the regulation of RMDs, qualifying patients with hardship cultivation registrations, or any other aspects of marijuana for medical use. However, nothing in 105 CMR 725.000 shall be construed so as to prohibit lawful local oversight and regulation, including fee requirements, that does not conflict or interfere with the operation of 105 CMR 725.000.

725.650: Non-conflict with Other Law

(A) Nothing in 105 CMR 725.000 shall be construed to limit the applicability of other law as it pertains to the rights of landlords, employers, law enforcement authorities, or regulatory agencies.

(B) Nothing in 105 CMR 725.000:

(1) Allows the operation of a motor vehicle, boat, or aircraft while under the influence of marijuana;

(2) Requires any health insurance provider, or any government agency or authority, to reimburse any person for the expenses of the medical use of marijuana;

(3) Requires any health care professional to authorize the use of medical marijuana for a patient;

(4) Requires any accommodation of any on-site medical use of marijuana in any place of employment, school bus or on school grounds, in any youth center, in any correctional facility, or of smoking medical marijuana in any public place;

(5) Supersedes Massachusetts law prohibiting the possession, cultivation, transport, distribution, or sale of marijuana for nonmedical purposes;

(6) Requires the violation of federal law or purports to give immunity under federal law;

(7) Poses an obstacle to federal enforcement of federal law.

(C) Nothing in 105 CMR 725.000 shall be construed to limit the scope of practice of a nurse practitioner pursuant to M.G.L. c. 112, § 80I.

Additional Reference Materials: DPH Guidance for Municipalities



CHARLES D. BAKER
Governor

KARYN E. POLITO
Lieutenant Governor

The Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Public Health
Bureau of Health Care Safety and Quality
Medical Use of Marijuana Program
99 Chauncy Street, 11th Floor, Boston, MA 02111

MARYLOU SUDDERS
Secretary

MONICA BHAREL, MD, MPH
Commissioner

Tel: 617-660-5370
www.mass.gov/medicalmarijuana

Guidance for Municipalities Regarding the Medical Use of Marijuana
Updated August 2015

The following information is provided to assist municipalities in addressing questions related to the marijuana for medical use. Additional information is available on our website at mass.gov/medicalmarijuana or by contacting our support center at (617) 660-5370 or medicalmarijuana@state.ma.us.

Department of Public Health Regulations & Local Laws or Regulations

Role of Municipalities. The Department of Public Health Regulations, 105 CMR 725.000, et. seq. (the “Regulations”)¹ implementing the Humanitarian Medical Use of Marijuana Act, Ch. 369 of the Acts of 2012 (the “Act”)² recognize the role of municipalities in adopting local laws and regulations regarding uses related to marijuana for medical use that are appropriate for their community.

Local Option. The Department does not, however, mandate any involvement by municipalities or local boards of health in the regulation of registered marijuana dispensaries (“RMDs”), qualifying patients with hardship cultivation registrations, or any other aspects of marijuana for medical use. 105 CMR 725.600(B).

Compliance with Local Law. The Regulations require RMDs and all other persons registered with the Medical Use of Marijuana Program to comply with all local ordinances, bylaws and regulations. 105 CMR 725.600(A). Nothing in the Regulations will be construed to prohibit lawful local oversight and regulation that does not conflict or interfere with the operation of 105 CMR 725.000. 105 CMR 725.600(B). For example, 105 CMR 725.110(A)(11) requires that an RMD must “[e]nsure that trees, bushes, and other foliage outside of the RMD do not allow for a person or persons to conceal themselves from sight...” Local ordinances or bylaws may not require landscaping that would conflict with this provision.

The Attorney General’s Office has issued decisions regarding bylaws or ordinances that it believes to conflict with state law, including a bylaw attempted to prohibit RMDs, a bylaw requiring all registered qualified patients within a municipality to register with the municipality, bylaws requiring personal caregivers or anyone engaged in home cultivation to register with local officials who are not law enforcement personnel, bylaws requiring a special permit for home cultivation, bylaws limiting home cultivation to a particular area in the community, bylaws prohibiting home delivery, bylaws requiring buffer zones around home cultivation sites, and bylaws requiring RMDs to comply with federal law. For

¹ <http://www.mass.gov/eohhs/docs/dph/regs/105cmr725.pdf>

² <https://malegislature.gov/Laws/SessionLaws/Acts/2012/Chapter369>

more information on the decisions of the Attorney General's Office regarding bylaws or ordinances regarding marijuana for medical use, please consult the website for the Attorney General's Office at <http://www.mlu.ago.state.ma.us/>.

Municipalities must use their best judgment in crafting local requirements, so as not to create a conflict with 105 CMR 725.000. When in doubt, the municipality should consult its Town Counsel or City Solicitor.

Buffer Zone. One opportunity for municipalities to exercise local control over the placement of RMDs in their community is the setting of a buffer zone. The Regulations, 105 CMR 725.110(A)(14), state:

A RMD shall comply with all local requirements regarding siting, provided however that if no local requirements exist, a RMD shall not be sited within a radius of five hundred feet of a school, daycare center, or any facility in which children commonly congregate. The 500 foot distance under this section is measured in a straight line from the nearest point of the facility in question to the nearest point of the proposed RMD.

The Department measures the distance from building to building rather than property line to property line. A facility is not, however, limited to a building. For example, a playground outside a school would be considered a facility where children congregate, so in that case the line would be measured from the edge of the playground to the nearest point of the building that would house the potential RMD. If a municipality enacts its local bylaw or ordinance regarding the buffer zone, it may also determine its own standard of measure.

The Department interprets a "facility in which children commonly congregate" to include facilities in which children are gathered for a particular purposes in a structured and scheduled manner or which are dedicated to the use of children, such as playgrounds, youth services programs, day care centers, youth sports facilities, dance schools, and gymnastic schools. It includes a private home housing a family day care center, but not a private home where children happen to live. It does not include other facilities, such as ice cream shops, where children may happen to congregate, but not in a structured, scheduled manner.

Municipalities may set their own buffer zone, but if they do not, the default buffer zone will be the 500 foot distance described in the Regulations.

Local Permitting. Municipalities are not required to wait for DPH to issue an RMD a Provisional Certificate of Registration before acting on local permit applications, but may elect to require an RMD to demonstrate that it has received such a registration first. Please note, however, that under the Regulations, 105 CMR 725.100(B)(5)(f), an RMD must submit architectural plans to the Department prior to construction or renovation of an RMD. Proceeding with construction or renovation without Department approval is done at the applicant's risk and any construction or renovation already performed may need to be changed at the applicant's expense.

Registered Marijuana Dispensaries

Vertically-Integrated System. In Massachusetts, the RMDs are required to be "vertically-integrated," which means RMDs grow and process their own marijuana, with limited exceptions, rather than purchasing marijuana from a supplier.

Non-Profit Requirement. Only an entity that is incorporated in Massachusetts as a non-profit corporation under M.G.L. c. 180 can apply to operate an RMD.

Retail v. Cultivation. An RMD may have a retail facility, as well as cultivation and processing operations. Some RMDs elect to do cultivation, processing and retail operations all in one location, which is commonly referred to as a “co-located” operation. An RMD may also choose to have a retail dispensary in one location and grow marijuana at a remote cultivation location. It may conduct the processing of the marijuana at either the retail dispensary location or the remote cultivation location. The remote cultivation location need not be in the same municipality or even the same county as the retail dispensary.

Multiple RMDs. A non-profit corporation may operate up to 3 RMDs. The retail dispensaries of one non-profit corporation may share a remote cultivation facility. Different non-profit corporations may not, however, share a remote cultivation facility with each other.

Amount of Marijuana. There is no specified numeric maximum amount that an RMD may have on its premises. The Regulations require that RMDs must limit their inventory of seeds, plants, and useable marijuana to reflect the projected needs of registered qualifying patients. 105 CMR 725.105(G)(1).

Number of RMDs per Municipality. It is up to a municipality to determine how many RMDs it deems appropriate for the community. The municipality may express that determination through granting or denying a request by an applicant for a letter of support or non-opposition. An RMD will not be permitted to proceed to the Inspections Phase if it has not obtained a letter of support or non-opposition.

Taxation. The Department of Revenue (“DOR”) has determined that the sales tax exemption for prescription medicine in G.L. c. 64H, § 6(l) applies to sales of marijuana and products containing marijuana to a qualifying patient or the patient’s personal caregiver pursuant to a written certification by a licensed physician. Any other supplies, educational materials or other items sold by the medical marijuana treatment center are subject to tax unless another exemption applies. For further information, please consult the DOR website: <http://www.mass.gov/dor/businesses/help-and-resources/legal-library/directives/directives-by-years/2015-directives/dd-15-1.html>; or consult your Town Counsel or City Solicitor for further information.

Other Activities at an RMD. An RMD is defined as a non-profit entity “that acquires, cultivates, possesses, processes (including development of related products such as edible MIPs, tinctures, aerosols, oils, or ointments), transfers, transports, sells, distributes, dispenses, or administers marijuana, products containing marijuana, related supplies, or educational materials to registered qualifying patients or their personal caregivers.” An RMD is not a health care provider or a provider of general wellness services. Under the Regulations, 105 CMR 725.105(N)(7), an RMD may not sell any products other than marijuana, marijuana-infused products (MIPs), marijuana seeds, and other products such as vaporizers that facilitate the use of marijuana for medical purposes. RMDs may, however, conduct a patient education program in compliance with the Regulations, 105 CMR 725.105(K).

Hours of Operation. The Regulations do not specify particular hours of operation. Municipalities may set reasonable requirements in this regard.

Home Delivery. The Regulations permit, but do not require, home delivery to registered qualifying patients and personal caregivers within the Commonwealth.

Limitations on Entry. Only registered qualifying patients, personal caregivers, dispensary agents and authorized state and local officials may enter an RMD, with strictly limited exceptions.

Patient Choice. Qualifying patients may choose to purchase from different dispensaries from around the Commonwealth. RMDs are required to track purchases in the Medical Use of Marijuana Online

Registration System so that patients are not permitted to purchase more than the amount their physician has certified as appropriate for their debilitating medical condition.

Coordination with local law enforcement. The Regulations require RMDs to coordinate with local enforcement regarding panic alarms, providing hours of operation, after-hours contact information and access to RMD surveillance operations; as well as requiring dispensary agents to produce their Program ID Card to law enforcement upon request.

Certain issues must be reported to local law enforcement, often within 24 hours: diversion of marijuana; unusual discrepancies identified during inventory, theft, loss and any criminal action; unusual discrepancy in weight or inventory during transportation; any vehicle accidents, diversions, losses, or other reportable incidents that occur during transport; any suspicious act involving the sale, cultivation, distribution, processing, or production of marijuana by any person; unauthorized destruction of marijuana; any loss or unauthorized alteration of records related to marijuana, registered qualifying patients, personal caregivers, or dispensary agents; an alarm activation or other event that requires response by public safety personnel; failure of any security alarm system due to a loss of electrical power or mechanical malfunction that is expected to last longer than eight hours; and any other breach of security.

Ongoing Inspections. The Department will conduct ongoing inspections of RMDs after they open, including scheduled and unscheduled inspections. If local officials encounter issues with an RMD, they should contact the Medical Use of Marijuana Program at (617) 66-5370 or RMDcompliance@state.ma.us.

Annual Registration Renewal. RMDs are required to renew their registration annually with the Department.

The RMD Application Process

Overview. DPH will evaluate the applications received on or after June 29, 2015 on a rolling basis, with priority given to the review of applicants proposing to site an RMD in an Open County. Each successful applicant will be notified that they are authorized to proceed to the Inspection Phase, during which they may seek all required local permits, and when authorized by their community, commence building out the RMD. The Inspections Phase also includes evaluation of documentation prepared in compliance with the Regulations and guidance provided by the Department regarding the operation of a nonprofit RMD. After passing all applicable local and state inspections, an RMD may receive a Final Certificate of Registration.

Role of Municipalities. Municipalities should determine what local permits or licenses may be required if a RMD wishes to locate there, and consult their Town Counsel or City Solicitor if there are any questions about the required process.

Proposed Locations. As part of the application process, an RMD applicant will submit an *Application of Intent*, a *Management and Operations Profile*, and a *Siting Profile* in sequential order. An applicant must be formally invited by the Department in writing in order to submit a *Management and Operations Profile* or *Siting Profile*. An RMD applicant does not inform the Department of their proposed RMD location(s) until the time of submission of the *Siting Profile*.

Letters of Support or Non-Opposition. RMDs may approach municipal officials to acquire letters of local support or non-opposition, which is required for the *Siting Profile* portion of the application. An RMD is required to obtain a letter of support or non-opposition from its host community before it will be

permitted to proceed to the Inspection Phase. In terms of the evaluation, there is no difference between a letter of support or a letter of non-opposition. Either letter will satisfy the requirement.

If the applicant is proposing a retail dispensary location and a remote cultivation facility, the applicant must submit a letter of support or non-opposition from both municipalities. This letter may be signed by (a) the Chief Executive Officer/Chief Administrative Officer, as appropriate, for the desired municipality; or (b) the City Council, Board of Alderman, or Board of Selectmen for the desired municipality. The applicant's choice of (a) or (b) should be done in consultation with the host community. Each letter requires that particular language be included in the letter, as provided in Section C of the *Siting Profile*. If the applicant and the host community choose (b), please note that the template language requires the signor to state that there was a vote to sign the letter taken at a duly noticed meeting and to identify the date of that meeting.

Notification of Municipality. After receiving an invitation to submit a *Management and Operations Profile*, the applicant must Notify the chief administrative officer, or equivalent, and chief of police, or equivalent, of the proposed city or town in which an RMD would be sited, if applicable, and the sheriff of the applicable county, of the intent to submit a *Management and Operation Profile* and a *Siting Profile*.

Municipal Approval Prior to Opening. Before an RMD can open, it must comply with all local rules, regulations, ordinances and bylaws, in addition to all applicable state laws.

Home Cultivation

Eligibility: The Regulations allow for home cultivation, also known as “hardship cultivation” when a qualifying patient meets at least one of three criteria:

- Verified financial hardship;
- Physical incapacity to access reasonable transportation;
- Lack of an RMD within a reasonable distance.
-

Until the Department announces the registration of home or hardship cultivators, qualifying patients and personal caregivers are permitted to engage in limited cultivation in compliance with the Regulations.

Where. Home cultivation may only occur at either the qualifying patient's or personal caregiver's primary residence, but not both.

How. Cultivation and storage must occur in an enclosed, locked area, not visible for the street or other public areas. Only an amount sufficient to provide the qualifying patient with a sixty day supply may be cultivated.

Online Registration System

Who. The Online Registration System provides online certification and registration for qualifying patients, as well as registration for physicians, personal caregivers and dispensary agents. Pediatric patients are registered through a paper process.

Accessible. The Online Registration System allows access for law enforcement 24 hours a day, 7 days a week.

Verification. The Online Registration System allows law enforcement to verify that an individual may legally possess marijuana.

Real-Time. The Online Registration System allows real-time updates of certification and registration information.

Secure. The Online Registration System has appropriate security and access limitations to protect sensitive or confidential information.

Additional Information. Further information regarding the Online Registration System may be found on the Medical Use of Marijuana Program website:

<http://www.mass.gov/eohhs/gov/departments/dph/programs/hcq/medical-marijuana/patients-and-caregivers.html>.

Public Records

Protection of RMD Security Information. Municipalities may receive information about RMDs in the course of the local permitting process that may compromise the RMD if disclosed.

Municipalities may refer to exemption (n) to the definition of “public records” in M.G.L. c. 4, s. 7, which provides that the following are exempt from disclosure as public records:

“(n) records, including, but not limited to, blueprints, plans, policies, procedures and schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or vulnerability assessments, or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation or other infrastructure located within the commonwealth, the disclosure of which, in the reasonable judgment of the record custodian, subject to review by the supervisor of public records under subsection (b) of section 10 of chapter 66, is likely to jeopardize public safety.”

Municipalities should consult with their Town Counsel or City Solicitor regarding Public Records laws and use their best efforts to keep confidential any information that, if released, may jeopardize public safety.

Arlington Police Department


Frederick Ryan
Chief of Police



POLICE HEADQUARTERS
112 Mystic Street
Telephone 781-316-3900

Town of Arlington
MASSACHUSETTS 02474

Date: November 16, 2015
To: Adam Chapdelaine
Town Manager
From: Frederick Ryan
Chief of Police
Re: Medical Marijuana Dispensary



As town officials contemplate the policy issues surrounding the potential presence of a medical marijuana dispensary in the community, I would like to seek this opportunity to weigh in on matters relating to public safety and quality of life issues likely to present themselves should such a dispensary be authorized.

Pre-Existing Resource Challenges

More than a decade ago the Arlington Board of Selectman commissioned a management study of the police department. The resulting report and recommendations documented the fact that the police department was severely understaffed when compared to the service demand of the community and as compared to other similarly situated communities in the Commonwealth. While all of the consultant's recommendations relative to internal management controls/practices were implemented by police department staff, the town chose not to fund the recommendations of the consultant relative to police staffing levels.

Since that time, the demand on police services has increased exponentially. For example, the community has authorized dozens of new liquor licenses (now a total of 53) as well as liquor stores, passed several new bylaws (noise abatement, door to door solicitation, traffic control, etc.), annual calls for service continue to climb, the complexity of criminal investigations/cyber crime increases daily, and the demand for traffic control/safety following a series of traffic fatalities, is at an all time high.

More recently, the police department, along with our public health counterparts, have been faced with an opiate epidemic in the community that has resulted in twice the number of overdoses (fatal & non-fatal) in CY2015 as compared to CY2014. The police resources committed to drug control, education, and prevention in response to the presence of illegal narcotics and associated crime in the community has caused a significant strain on police resources.

Despite these and many other challenges, the police department remains at the same staffing level as when the management study was originally commissioned.

Proactive and Proud

Police Service Demand

There is no question that the presence of a marijuana dispensary in the community will add demand to the community's police capacity, a capacity that is already stretched to the limit. Other communities with dispensaries have experienced a situation where the presence of a dispensary has drawn a large volume of persons from outside of the community for the sole purpose of purchasing marijuana.

We would expect, at a minimum, to experience an increase in traffic/parking violations, burglary, loitering, disturbances, public consumption of alcohol/marijuana, and other calls for service.

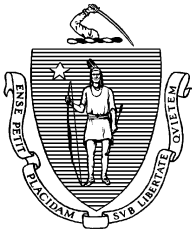
Conclusion/Recommendation

Building trust and legitimacy between the citizenry and business people in the community is among our highest priorities as a police department. Managing calls for service to the neighborhood of a Medical Marijuana dispensary on a reactive basis would likely erode such trust. On the other hand, having regularly assigned foot patrol officers to the major retail areas in Arlington during daytime and evening hours would result in relationship building among business people and residents that would result in more proactive problem solving to prevent any adverse impacts that may be caused by the dispensary.

In order to deploy such foot patrols we would need to add four (4) Patrol Officers to the department at an annual operating cost of about \$400,000; further, I would recommend that we consider fully funding the Arlington Youth Health and Safety Coalition staff and related prevention activities so as to enhance our substance abuse prevention posture in the community.

Any public endorsement by me would hinge upon a mitigation plan that included such funding.

"Proactive and Proud"



CHARLES D. BAKER
Governor

KARYN E. POLITO
Lieutenant Governor

The Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Public Health
Bureau of Health Care Safety and Quality
Medical Use of Marijuana Program

99 Chauncy Street, 11th Floor, Boston, MA 02111

MARYLOU SUDDERS
Secretary

MONICA BHAREL, MD, MPH
Commissioner

Tel: 617-660-5370
www.mass.gov/medicalmarijuana

Guidance for Municipalities Regarding the Medical Use of Marijuana
Updated August 2015

The following information is provided to assist municipalities in addressing questions related to the marijuana for medical use. Additional information is available on our website at mass.gov/medicalmarijuana or by contacting our support center at (617) 660-5370 or medicalmarijuana@state.ma.us.

Department of Public Health Regulations & Local Laws or Regulations

Role of Municipalities. The Department of Public Health Regulations, 105 CMR 725.000, et. seq. (the “Regulations”)¹ implementing the Humanitarian Medical Use of Marijuana Act, Ch. 369 of the Acts of 2012 (the “Act”)² recognize the role of municipalities in adopting local laws and regulations regarding uses related to marijuana for medical use that are appropriate for their community.

Local Option. The Department does not, however, mandate any involvement by municipalities or local boards of health in the regulation of registered marijuana dispensaries (“RMDs”), qualifying patients with hardship cultivation registrations, or any other aspects of marijuana for medical use. 105 CMR 725.600(B).

Compliance with Local Law. The Regulations require RMDs and all other persons registered with the Medical Use of Marijuana Program to comply with all local ordinances, bylaws and regulations. 105 CMR 725.600(A). Nothing in the Regulations will be construed to prohibit lawful local oversight and regulation that does not conflict or interfere with the operation of 105 CMR 725.000. 105 CMR 725.600(B). For example, 105 CMR 725.110(A)(11) requires that an RMD must “[e]nsure that trees, bushes, and other foliage outside of the RMD do not allow for a person or persons to conceal themselves from sight...” Local ordinances or bylaws may not require landscaping that would conflict with this provision.

The Attorney General’s Office has issued decisions regarding bylaws or ordinances that it believes to conflict with state law, including a bylaw attempted to prohibit RMDs, a bylaw requiring all registered qualified patients within a municipality to register with the municipality, bylaws requiring personal caregivers or anyone engaged in home cultivation to register with local officials who are not law enforcement personnel, bylaws requiring a special permit for home cultivation, bylaws limiting home cultivation to a particular area in the community, bylaws prohibiting home delivery, bylaws requiring buffer zones around home cultivation sites, and bylaws requiring RMDs to comply with federal law. For

¹ <http://www.mass.gov/eohhs/docs/dph/regs/105cmr725.pdf>

² <https://malegislature.gov/Laws/SessionLaws/Acts/2012/Chapter369>

more information on the decisions of the Attorney General's Office regarding bylaws or ordinances regarding marijuana for medical use, please consult the website for the Attorney General's Office at <http://www.mlu.ago.state.ma.us/>.

Municipalities must use their best judgment in crafting local requirements, so as not to create a conflict with 105 CMR 725.000. When in doubt, the municipality should consult its Town Counsel or City Solicitor.

Buffer Zone. One opportunity for municipalities to exercise local control over the placement of RMDs in their community is the setting of a buffer zone. The Regulations, 105 CMR 725.110(A)(14), state:

A RMD shall comply with all local requirements regarding siting, provided however that if no local requirements exist, a RMD shall not be sited within a radius of five hundred feet of a school, daycare center, or any facility in which children commonly congregate. The 500 foot distance under this section is measured in a straight line from the nearest point of the facility in question to the nearest point of the proposed RMD.

The Department measures the distance from building to building rather than property line to property line. A facility is not, however, limited to a building. For example, a playground outside a school would be considered a facility where children congregate, so in that case the line would be measured from the edge of the playground to the nearest point of the building that would house the potential RMD. If a municipality enacts its local bylaw or ordinance regarding the buffer zone, it may also determine its own standard of measure.

The Department interprets a "facility in which children commonly congregate" to include facilities in which children are gathered for a particular purposes in a structured and scheduled manner or which are dedicated to the use of children, such as playgrounds, youth services programs, day care centers, youth sports facilities, dance schools, and gymnastic schools. It includes a private home housing a family day care center, but not a private home where children happen to live. It does not include other facilities, such as ice cream shops, where children may happen to congregate, but not in a structured, scheduled manner.

Municipalities may set their own buffer zone, but if they do not, the default buffer zone will be the 500 foot distance described in the Regulations.

Local Permitting. Municipalities are not required to wait for DPH to issue an RMD a Provisional Certificate of Registration before acting on local permit applications, but may elect to require an RMD to demonstrate that it has received such a registration first. Please note, however, that under the Regulations, 105 CMR 725.100(B)(5)(f), an RMD must submit architectural plans to the Department prior to construction or renovation of an RMD. Proceeding with construction or renovation without Department approval is done at the applicant's risk and any construction or renovation already performed may need to be changed at the applicant's expense.

Registered Marijuana Dispensaries

Vertically-Integrated System. In Massachusetts, the RMDs are required to be "vertically-integrated," which means RMDs grow and process their own marijuana, with limited exceptions, rather than purchasing marijuana from a supplier.

Non-Profit Requirement. Only an entity that is incorporated in Massachusetts as a non-profit corporation under M.G.L. c. 180 can apply to operate an RMD.

Retail v. Cultivation. An RMD may have a retail facility, as well as cultivation and processing operations. Some RMDs elect to do cultivation, processing and retail operations all in one location, which is commonly referred to as a “co-located” operation. An RMD may also choose to have a retail dispensary in one location and grow marijuana at a remote cultivation location. It may conduct the processing of the marijuana at either the retail dispensary location or the remote cultivation location. The remote cultivation location need not be in the same municipality or even the same county as the retail dispensary.

Multiple RMDs. A non-profit corporation may operate up to 3 RMDs. The retail dispensaries of one non-profit corporation may share a remote cultivation facility. Different non-profit corporations may not, however, share a remote cultivation facility with each other.

Amount of Marijuana. There is no specified numeric maximum amount that an RMD may have on its premises. The Regulations require that RMDs must limit their inventory of seeds, plants, and useable marijuana to reflect the projected needs of registered qualifying patients. 105 CMR 725.105(G)(1).

Number of RMDs per Municipality. It is up to a municipality to determine how many RMDs it deems appropriate for the community. The municipality may express that determination through granting or denying a request by an applicant for a letter of support or non-opposition. An RMD will not be permitted to proceed to the Inspections Phase if it has not obtained a letter of support or non-opposition.

Taxation. The Department of Revenue (“DOR”) has determined that the sales tax exemption for prescription medicine in G.L. c. 64H, § 6(l) applies to sales of marijuana and products containing marijuana to a qualifying patient or the patient’s personal caregiver pursuant to a written certification by a licensed physician. Any other supplies, educational materials or other items sold by the medical marijuana treatment center are subject to tax unless another exemption applies. For further information, please consult the DOR website: <http://www.mass.gov/dor/businesses/help-and-resources/legal-library/directives/directives-by-years/2015-directives/dd-15-1.html>; or consult your Town Counsel or City Solicitor for further information.

Other Activities at an RMD. An RMD is defined as a non-profit entity “that acquires, cultivates, possesses, processes (including development of related products such as edible MIPs, tinctures, aerosols, oils, or ointments), transfers, transports, sells, distributes, dispenses, or administers marijuana, products containing marijuana, related supplies, or educational materials to registered qualifying patients or their personal caregivers.” An RMD is not a health care provider or a provider of general wellness services. Under the Regulations, 105 CMR 725.105(N)(7), an RMD may not sell any products other than marijuana, marijuana-infused products (MIPs), marijuana seeds, and other products such as vaporizers that facilitate the use of marijuana for medical purposes. RMDs may, however, conduct a patient education program in compliance with the Regulations, 105 CMR 725.105(K).

Hours of Operation. The Regulations do not specify particular hours of operation. Municipalities may set reasonable requirements in this regard.

Home Delivery. The Regulations permit, but do not require, home delivery to registered qualifying patients and personal caregivers within the Commonwealth.

Limitations on Entry. Only registered qualifying patients, personal caregivers, dispensary agents and authorized state and local officials may enter an RMD, with strictly limited exceptions.

Patient Choice. Qualifying patients may choose to purchase from different dispensaries from around the Commonwealth. RMDs are required to track purchases in the Medical Use of Marijuana Online

Registration System so that patients are not permitted to purchase more than the amount their physician has certified as appropriate for their debilitating medical condition.

Coordination with local law enforcement. The Regulations require RMDs to coordinate with local enforcement regarding panic alarms, providing hours of operation, after-hours contact information and access to RMD surveillance operations; as well as requiring dispensary agents to produce their Program ID Card to law enforcement upon request.

Certain issues must be reported to local law enforcement, often within 24 hours: diversion of marijuana; unusual discrepancies identified during inventory, theft, loss and any criminal action; unusual discrepancy in weight or inventory during transportation; any vehicle accidents, diversions, losses, or other reportable incidents that occur during transport; any suspicious act involving the sale, cultivation, distribution, processing, or production of marijuana by any person; unauthorized destruction of marijuana; any loss or unauthorized alteration of records related to marijuana, registered qualifying patients, personal caregivers, or dispensary agents; an alarm activation or other event that requires response by public safety personnel; failure of any security alarm system due to a loss of electrical power or mechanical malfunction that is expected to last longer than eight hours; and any other breach of security.

Ongoing Inspections. The Department will conduct ongoing inspections of RMDs after they open, including scheduled and unscheduled inspections. If local officials encounter issues with an RMD, they should contact the Medical Use of Marijuana Program at (617) 66-5370 or RMDcompliance@state.ma.us.

Annual Registration Renewal. RMDs are required to renew their registration annually with the Department.

The RMD Application Process

Overview. DPH will evaluate the applications received on or after June 29, 2015 on a rolling basis, with priority given to the review of applicants proposing to site an RMD in an Open County. Each successful applicant will be notified that they are authorized to proceed to the Inspection Phase, during which they may seek all required local permits, and when authorized by their community, commence building out the RMD. The Inspections Phase also includes evaluation of documentation prepared in compliance with the Regulations and guidance provided by the Department regarding the operation of a nonprofit RMD. After passing all applicable local and state inspections, an RMD may receive a Final Certificate of Registration.

Role of Municipalities. Municipalities should determine what local permits or licenses may be required if a RMD wishes to locate there, and consult their Town Counsel or City Solicitor if there are any questions about the required process.

Proposed Locations. As part of the application process, an RMD applicant will submit an *Application of Intent*, a *Management and Operations Profile*, and a *Siting Profile* in sequential order. An applicant must be formally invited by the Department in writing in order to submit a *Management and Operations Profile* or *Siting Profile*. An RMD applicant does not inform the Department of their proposed RMD location(s) until the time of submission of the *Siting Profile*.

Letters of Support or Non-Opposition. RMDs may approach municipal officials to acquire letters of local support or non-opposition, which is required for the *Siting Profile* portion of the application. An RMD is required to obtain a letter of support or non-opposition from its host community before it will be

permitted to proceed to the Inspection Phase. In terms of the evaluation, there is no difference between a letter of support or a letter of non-opposition. Either letter will satisfy the requirement.

If the applicant is proposing a retail dispensary location and a remote cultivation facility, the applicant must submit a letter of support or non-opposition from both municipalities. This letter may be signed by (a) the Chief Executive Officer/Chief Administrative Officer, as appropriate, for the desired municipality; or (b) the City Council, Board of Alderman, or Board of Selectmen for the desired municipality. The applicant's choice of (a) or (b) should be done in consultation with the host community. Each letter requires that particular language be included in the letter, as provided in Section C of the *Siting Profile*. If the applicant and the host community choose (b), please note that the template language requires the signor to state that there was a vote to sign the letter taken at a duly noticed meeting and to identify the date of that meeting.

Notification of Municipality. After receiving an invitation to submit a *Management and Operations Profile*, the applicant must Notify the chief administrative officer, or equivalent, and chief of police, or equivalent, of the proposed city or town in which an RMD would be sited, if applicable, and the sheriff of the applicable county, of the intent to submit a *Management and Operation Profile* and a *Siting Profile*.

Municipal Approval Prior to Opening. Before an RMD can open, it must comply with all local rules, regulations, ordinances and bylaws, in addition to all applicable state laws.

Home Cultivation

Eligibility: The Regulations allow for home cultivation, also known as “hardship cultivation” when a qualifying patient meets at least one of three criteria:

- Verified financial hardship;
- Physical incapacity to access reasonable transportation;
- Lack of an RMD within a reasonable distance.
-

Until the Department announces the registration of home or hardship cultivators, qualifying patients and personal caregivers are permitted to engage in limited cultivation in compliance with the Regulations.

Where. Home cultivation may only occur at either the qualifying patient's or personal caregiver's primary residence, but not both.

How. Cultivation and storage must occur in an enclosed, locked area, not visible for the street or other public areas. Only an amount sufficient to provide the qualifying patient with a sixty day supply may be cultivated.

Online Registration System

Who. The Online Registration System provides online certification and registration for qualifying patients, as well as registration for physicians, personal caregivers and dispensary agents. Pediatric patients are registered through a paper process.

Accessible. The Online Registration System allows access for law enforcement 24 hours a day, 7 days a week.

Verification. The Online Registration System allows law enforcement to verify that an individual may legally possess marijuana.

Real-Time. The Online Registration System allows real-time updates of certification and registration information.

Secure. The Online Registration System has appropriate security and access limitations to protect sensitive or confidential information.

Additional Information. Further information regarding the Online Registration System may be found on the Medical Use of Marijuana Program website:

<http://www.mass.gov/eohhs/gov/departments/dph/programs/hcq/medical-marijuana/patients-and-caregivers.html>.

Public Records

Protection of RMD Security Information. Municipalities may receive information about RMDs in the course of the local permitting process that may compromise the RMD if disclosed.

Municipalities may refer to exemption (n) to the definition of “public records” in M.G.L. c. 4, s. 7, which provides that the following are exempt from disclosure as public records:

“(n) records, including, but not limited to, blueprints, plans, policies, procedures and schematic drawings, which relate to internal layout and structural elements, security measures, emergency preparedness, threat or vulnerability assessments, or any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation or other infrastructure located within the commonwealth, the disclosure of which, in the reasonable judgment of the record custodian, subject to review by the supervisor of public records under subsection (b) of section 10 of chapter 66, is likely to jeopardize public safety.”

Municipalities should consult with their Town Counsel or City Solicitor regarding Public Records laws and use their best efforts to keep confidential any information that, if released, may jeopardize public safety.



Town of Arlington, Massachusetts

Net Metering Letter to Legislature

Summary:

Ryan Katofsky, Sustainable Arlington

ATTACHMENTS:

	Type	File Name	Description
▢	Document for Approval	BOS_letter_on_solar_-_final_draft.pdf	Letter

DRAFT – DO NOT DISTRIBUTE

Dear President Rosenberg and Speaker DeLeo:

RE: Continuing strong support for solar energy in Massachusetts

The Arlington Board of Selectmen is writing to ask you to support continued development of solar energy in Massachusetts by (1) raising the cap on net metering (2) maintaining a fair value for net metering credits, taking into account project size and type, with continued valuation of credits at full retail rates for small projects, and (3) creating a new solar incentive program to reach more ambitious solar energy goals after the current goal of 1,600 megawatts (MW) is reached. We believe this is the only way that Massachusetts will be able to achieve continued progress and meet our ambitious solar energy and climate goals.

Massachusetts has a long history of developing renewable energy policies that have yielded significant economic and environmental benefits, and we appreciate the efforts of the Administration and the Legislature to preserve our Commonwealth's national leadership in energy efficiency and renewable energy. We believe that a balanced, long-term energy plan with a variety of energy sources providing safe, efficient and reliable energy is essential in order to maintain and increase Massachusetts' economic growth while providing a high quality of life for our residents.

Electricity from solar energy is absolutely essential. Massachusetts has become a leader in solar energy development, with over 900 MW of installed solar capacity statewide. Indeed, this far exceeds the original goal of 250 MW by 2017, and the Commonwealth is well on its way to achieving the current goal of 1,600 MW by 2020, if not sooner.

Local efforts to install solar power systems on residential, commercial, and municipal properties have underpinned this success. Arlington has been a leader in these efforts and has a thriving solar energy market, including being home to the solar installation company SunBug Solar. When we participated in the 2012 round of Solarize Mass, there were approximately 40-50 solar power systems in town, including at least three commercial building systems. Nearly 160 systems were added through the Solarize Arlington campaign and today, there are several hundred systems in operation or development, with permits issued for nearly 100 systems in just the last six months. In addition, we recently installed over 700 kW of solar power on six of our schools, which will save the town money, contribute to statewide emissions reduction targets and provide an important learning opportunity for our students. All of this is clear evidence that the policy framework established in the Commonwealth has been successful.

To sustain progress and continue building on the Commonwealth's previous achievements, the Arlington Board of Selectmen strongly favors raising the net metering caps. Net metering is an essential part of solar development financing. The caps have already been reached in the National Grid and Unitil service territories,

DRAFT – DO NOT DISTRIBUTE

stalling municipal and private projects currently under development and precluding new ones from beginning. We are concerned that soon the applications for projects in other areas, including Arlington, will hit their cap limits as well.

Moreover, the value of net metering credits must be kept at a reasonable level. Current policy, in many instances, is to value net metering credits at the full retail rate. Several of the solar bills under consideration would decrease the value of net metering credits for new projects, once the goal of 1,600 MW is reached. We appreciate the intentions of these bills to support municipal and privately owned solar projects and sustain solar development. But we are concerned that some proposed changes in the net metering policy could risk future projects.

In addition, since the SREC II incentive program will expire when we have reached 1,600 MW of solar capacity, we strongly support the creation of a new program that would lower costs for ratepayers while allowing us to achieve even greater long-term solar energy goals and take full advantage of the federal tax credits, which have just been extended.

Thank you very much.

Sincerely,

Kevin F. Greeley
Chair, Arlington Board of Selectmen

CC:

Hon. Charlie Baker, Governor
Hon. Kenneth J. Donnelly, Senator,
Hon. David M. Rogers, Representative,
Hon. Sean Garballey, Representative,
Hon. Thomas H. Golden, House Chair, Joint TUE Committee
Senate Chair: Hon. Benjamin P. Downing, Joint Conference Committee
House Chair: Hon. Brian Dempsey
Senate Minority Member: Hon. Bruce E. Tarr
House Minority Member: Hon. Bradley H. Jones, Jr.
Senate Member: Hon. Marc R. Pacheco
House Member: Hon. Thomas A. Golden, Jr.



Town of Arlington, Massachusetts

Community Compact - Endorsement of Best Practices

Summary:

Adam W. Chapdelaine, Town Manager

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Memo_Community_Compacts_2_22_16.pdf	Memorandum to Board



**Town of Arlington
Office of the Town Manager**

Adam W. Chapdelaine
Town Manager

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Arlington MA 02476-4908
Phone (781) 316-3010
Fax (781) 316-3019
E-mail: achapdelaine@town.arlington.ma.us
Website: www.arlingtonma.gov

To: Members of the Board of Selectmen
From: Adam Chapdelaine, Town Manager
RE: Commonwealth's Community Compact Program
Date: February 18, 2016

I am writing to request your endorsement of two best practices that I am recommending the Town pursue via the Commonwealth's Community Compact Program (CCP). As you may recall, participation in the CCP was included in the Board and Manager goals that were adopted last year. The CCP was initiated by the Baker Administration as a means of demonstrating a desire to form a partnership with cities and towns by promoting best practices and providing the resources to put such practices in place. A successfully signed Community Compact will provide the Town with bonus points on various state grant programs. The two best practices I am recommending are as follows:

- **Adoption of a Complete Streets Policy** – Including adoption of such a policy in the Community Compact application will allow the Town to earn bonus points on the current Complete Streets grant application. The Board has already endorsed this concept, and a draft policy is being worked on, so inclusion in this program seems appropriate.
- **Performance of an IT System Vulnerability Assessment** - After speaking with David Good, and staff from MassIT, we feel that this is a worthwhile pursuit to aid in increasing our cybersecurity on Town networks.

I look forward to discussing these matters with the Board at Monday's meeting and I am happy to answer any questions that the Board may have.



Town of Arlington, Massachusetts

Vote: Sponsorship of "Unconscious Bias" and "Stereotypes"

Summary:

Mary Harrison, Vision 2020 Diversity Task Group

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Vision_2020_e-mail_request.docx	Vision 2020 Reference
▢	Reference Material	Vision_2020_ref.2.22.pdf	Vision 2020 updated Reference 2.22

-----Original Message-----

From: Mary H <maharri16@yahoo.com>
To: DanDunn <dunster@dandunn.org>, DianeMahon <dianemahon@verizon.net>, JCurro <jcurro@alumni.tufts.edu>, Kevin Greeley <Greeleycom@aol.com>, Steven Byrne <smbyrne1987@gmail.com>
Cc: AdamChap <achapdelaine@town.arlington.ma.us>
Date: Fri, 12 Feb 2016 18:49:13 +0000 (UTC)
Subject: Vision 2020 Diversity Task Group Invitation to Sponsor 2 Spring Events

Dear Selectmen,

This Spring, Vision 2020 Diversity Task Group is presenting two major events in our series of programs focused on stereotypes, stigmas, and identity. We invite you to join our growing group of co-sponsors for these events. We're proud to say some organizations have approached us and asked to be included.

We will offer "Unconscious Bias" – a presentation followed by question and answer – on Thursday, April 7 in Town Hall, 7:30 to 9:00 p.m. I have attached our initial flyer.

With Arlington Center for the Arts, we present "Stereotypes: A Conscious Look at Race, Faith, Gender and Orientation" photography exhibit at ACA. The show will be in their Gibbs Gallery from March 7 – April 15, with a reception on March 31. Details about time and some Saturday open dates/times are in the works.

For your information, here are links to the show:

http://artnewengland.com/ed_review/stereotypes/
<https://www.bostonglobe.com/arts/2015/09/16/exhibit/6qH0SfCDptRbikRppVCpaP/story.html>

Co-sponsoring these events simply means the Board of Selectmen will be listed on our flyers and in our publicity. We'd love to have you be one of our sponsors!

Thanks for considering our invitation to co-sponsor "Unconscious Bias" and "Stereotypes."
Mary Harrison, Diversity Task Group

Vision 2020 Diversity Task Group

Presents

UNCONSCIOUS BIAS

Every day we make thousands of decisions, both big and small. Some, such as how much toothpaste to squeeze when brushing our teeth, have become so routine that we're hardly even aware of them. Others, such as choosing a job or a spouse, we make with great deliberation.

This seminar explores the mistakes that our minds make even when making big, important, thoughtful decisions, and how—without realizing it—our minds can lead us to behave in ways that don't align with our personal values.

This seminar isn't about dividing people into good and bad, us and them. Rather, it is an entertaining and interactive look at how our brains evolved in a world that presented us with very different choices from the world in which we live today. It is about identifying and understanding our unconscious biases, and learning how we can make smarter decisions in our families, careers, and communities.

Presenter: Christopher Dial is the Lab Manager of the Social Cognition Laboratory in the Department of Psychology at Harvard University. His work is focused on identifying, understanding, and managing unconscious biases. Christopher has worked and consulted in psychological sciences for more than a decade.

THURSDAY, APRIL 7, 2016

Doors open 7:00 p.m. Program starts 7:30 p.m.

ARLINGTON TOWN HALL 730 MASS AVENUE

www.arlingtonmadtg.org

Co-sponsors: Arlington Council on Aging; Arlington International Film Festival; Arlington Police Department; Calvary Church, Center for Jewish Life Arlington-Belmont, United Methodist; Equal Employment Opportunity Commission; First Parish Unitarian Universalist of Arlington; Housing Corporation of Arlington; ManKind Project of New England; Martin Luther King, Jr., Birthday Observance Committee; Mystic LGBTQ and Youth Support Network; Park Avenue Congregational Church, UCC; Robbins Library; St. Agnes Parish

Dear Selectmen,

February 19, 2016

Thank you for offering the Diversity Task Group an opportunity to speak to you about our "Unconscious Bias" and "Stereotypes: A Conscious Look at Race, Faith, Gender and Orientation" events. Unfortunately our meeting – a vital planning session -- is scheduled at the same time as your meeting. So in this letter, I'd like to provide some additional information for you about our spring events.

How and why did we decide to offer these events?

Several Diversity members had been discussing Harvard's Implicit Bias Project and taking some of the Project's bias tests online. One of our members suggested that we offer "Unconscious Bias" as a foundational piece of our efforts to help our community become aware of the hidden biases we all hold. We know Chief Ryan has trained many of his staff in this subject matter. Our speaker was willing to give the presentation without fee as long as we do not video or audio tape it. We have been planning this as our Spring Event. As of February 19, we have 21 confirmed co-sponsors that include Town organizations – youth organizations among them – and houses of worship. We expect several other organizations to join the sponsor list.

Last fall Diversity discussed topics that we might ask True Story Theater to present in partnership with us as part of TST's Living Brochures Project. Given a disturbing event at Spy Pond in late Spring 2015 and some events Chief Ryan had told us about, we decided that Stigma and Stereotype were important themes. In January 2016 we offered "Stigmas" to an audience of 50 people. Our Diversity Group took "Being An Active Bystander" training for our benefit and for us to see if we wanted to offer it widely. As a result, we will offer "Stigmas" again on May 10 and "Being An Active Bystander" on May 25. These events will be co-sponsored by Arlington Council on Aging, Arlington Disability Commission, Arlington Human Rights Commission, Housing Corporation of Arlington, and Mystic LGBTQ and Youth Support Network -- all groups that serve populations subject to stigmatizing.

Also in the fall, I met a friend from Concord who told me about the "Stereotypes" photography show and other resources that might be of interest to Arlington. I contacted photographer Kevin Briggs to see if we could bring his exhibit to Arlington, and then began the search for sites for the show. After viewing the show when it was at Harriet Tubman Galley in December, two of us were even more firmly committed to bringing this powerful exhibit to town, especially during our Spring events. (These now also include Diversity's co-sponsoring a panel on "Identity" with Robbins Library as part of Arlington Reads Together). Arlington Center for the Arts enthusiastically agreed to host the show in their Gibbs Gallery. ACA is a new partner for Diversity.

We have been excited about the confluence of efforts and events that have led to a strong focus on stigmas, stereotypes, and identity. We are also excited about the willingness – sometimes eagerness – of organizations to co-sponsor these events. Many of them have told us that the issues we are focusing on are ones they too are working on at this time.

We hope you will become a co-sponsor for these two major events. ACA will produce flyers at the end of this week (2/22-26). All sponsors not confirmed prior to printing will be listed on ACA's website. Diversity can continue to add sponsors to the "Bias" flyer for another week or so.

Sincerely,

Mary Harrison, Diversity Task Group

Confirmed Co-sponsors of "Stereotypes": Arlington Council on Aging; Arlington Disability Commission; Arlington Human Rights Commission; Arlington International Film Festival; Arlington Police Department; Arlington Youth Counseling Center; Arlington Youth Health & Safety Coalition; The First Church in Belmont Unitarian Universalist Social Action Committee; Highrock Covenant Church; Housing Corporation of Arlington; ManKind Project of New England; Martin Luther King, Jr., Birthday Observance Committee of Arlington; Mystic LGBTQ and Youth Support Network; Spiritual Assembly of Baha'is in Arlington

For co-sponsors of "Unconscious Bias" see attached flyer.

Arlington Vision 2020 Diversity Task Group

Presents

UNCONSCIOUS BIAS

Every day we make thousands of decisions, both big and small. Some, such as how much toothpaste to squeeze when brushing our teeth, have become so routine that we're hardly even aware of them. Others, such as choosing a job or a spouse, we make with great deliberation.

This seminar explores the mistakes that our minds make even when making big, important, thoughtful decisions, and how—without realizing it—our minds can lead us to behave in ways that don't align with our personal values.

This seminar isn't about dividing people into good and bad, us and them. Rather, it is an entertaining and interactive look at how our brains evolved in a world that presented us with very different choices from the world in which we live today. It is about identifying and understanding our unconscious biases, and learning how we can make smarter decisions in our families, careers, and communities.

Presenter: Christopher Dial is the Lab Manager of the Social Cognition Laboratory in the Department of Psychology at Harvard University. His work is focused on identifying, understanding, and managing unconscious biases. Christopher has worked and consulted in psychological sciences for more than a decade.

THURSDAY, APRIL 7, 2016

Doors open 7:00 p.m. Program starts 7:30 p.m.

ARLINGTON TOWN HALL 730 MASS AVENUE

Come by MBTA bus #77 or park in Town lot bordered by Pleasant & Chestnut Sts in Arlington Center

www.arlingtonmadtg.org

Co-sponsors: Arlington Council on Aging; Arlington Disability Commission; Arlington Human Rights Commission; Arlington International Film Festival; Arlington Police Department; Arlington Youth Counseling Center; Arlington Youth Health & Safety Coalition; Calvary Church United Methodist; Center for Jewish Life Arlington-Belmont; Equal Employment Opportunity Commission; The First Church in Belmont Unitarian Universalist Social Action Committee; First Parish Unitarian Universalist of Arlington; Highrock Covenant Church; Housing Corporation of Arlington; ManKind Project of New England; Martin Luther King, Jr., Birthday Observance Committee; Mystic LGBTQ and Youth Support Network; Park Avenue Congregational Church, UCC; Robbins Library; Spiritual Assembly of the Baha'is in Arlington; St. Agnes Parish



Town of Arlington, Massachusetts

Vote to Adopt: Suburban Coalition Resolution re the Foundation Budget Review Commission

Summary:

Paul Schlichtman, Chair, Arlington School Committee

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Suburban_Coalition_reference.pdf	Schlichtman e-mail, Suburban Coalition reference
▢ Reference Material	Schlichtman_ref._2.22.pdf	Reference submitted 2.22

Original Message-----

From: Paul Schlichtman <paul@schlichtman.org>

To: greeleycom@aol.com, MKrepelka@town.arlington.ma.us, Allan Tosti <abtosti@rcn.com>

Cc: Karen Fitzgerald <kfitzgerald@arlington.k12.ma.us>

Date: Thu, 11 Feb 2016 22:27:27 -0500

Subject: Fwd: [mascinfo] Suburban Coalition Resolution

On February 12, the Arlington School Committee voted to adopt the Suburban Coalition resolution pertaining to adopting the Foundation Budget Review Commission.

The school committee also asked me to forward the resolution to the Board of Selectmen and the Finance Committee, with the request that you join us in adopting the resolution.

Paul Schlichtman, Chair
Arlington School Committee

Sent from my iPad

Begin forwarded message:

From: info@suburbancoalition.org

To: gallivann@aol.com

Sent: 2/1/2016 6:16:20 A.M. Eastern Standard Time

Subj: A Call to Action on Chapter 70 Funding

Suburban Coalition

P.O. Box 103

Concord, MA 01742

suburbancoalition.org

Chapter 70 Resolution

The success of Massachusetts' economy is a result of dedicated commitment and strategic priorities. Beginning as the birthplace of public education in America and advancing to the 21st century, student achievement in Massachusetts is frequently cited, by various academic measurements, as the best in the nation. This enduring tenet is a key ingredient to the strength of our State's economy. Strong public schools provide the foundation for successful college students as well as a feeder system for bright, innovative future leaders in the workplace. If we do not take active steps to preserve our commitment to public education, other states will be glad to gain a marginal advantage. After acknowledging that the 1993 funding formula for Chapter 70 contains unrealistic and outdated factors, the Massachusetts Legislature commissioned a study group

known as the Foundation Budget Review Commission in 2014. The task was to determine the cost of providing an adequate education in current times in Massachusetts. The results were released in two phases, one in June 2015 and the other this past November, and they confirmed what educators and local officials have long known to be true: the cost of educating the students of Massachusetts is severely underestimated by the existing funding formula.

As we prepare local FY17 budgets, the Suburban Coalition urges each town's Board of Selectmen, School Committee and Finance Committee or Advisory Committee to adopt the attached resolution that simply asks the Legislature and the Governor to fund the recommendations of the Foundation Budget Review Commission.

Especially during the recession, the cost of an adequate education has disproportionately fallen on local taxpayers and the resulting strains on local budgets are not sustainable within the limits of Proposition 2 ½. The Suburban Coalition has chosen this specific area of focus because Chapter 70 is generally the single largest contributor to the bottom line of cities or towns' Cherry Sheets. Additionally, too many cities and towns have struggled with "minimum aid increases" for five or more years, and the timeliness of the Foundation Budget Review Commission's reports makes this the ideal budget cycle. With the release of the Governor's budget proposal, it has become clear that we need to stand together if we hope to see progress with Local Aid.

We would like to track our progress, so please alert us at DorothyPresser@suburbancoalition.org after your boards have voted to send the attached resolution [Chapter 70 Funding Resolution](#) (click to open) to Beacon Hill.

Sincerely,
Dorothy Presser
President

Reference documents on our position:

Foundation Budget Review Commission Final

Report <http://www.mass.gov/legis/journal/desktop/2015/fbrc.pdf>

"Cutting Class: Underfunding the Foundation Budget's Core Education Program", Massachusetts Budget and Policy Center http://www.massbudget.org/reports/pdf/Cutting_Class.pdf

"Our Communities and Our Commonwealth: Partners for Progress and Prosperity", Massachusetts Municipal Association http://www.mma.org/images/stories/NewsArticlePDFs/mma_news/mma_partnership_principles.pdf

"A Preview of the FY17 Budget", Massachusetts Budget and Policy Center http://massbudget.org/reports/pdf/FY17BudgetPreview_Final_1-21-2016.pdf

"Building a Strong Economy: The Role of Education, Transportation and Tax Policy", Massachusetts Budget & Policy Center <http://massbudget.org/reports/pdf/building%20a%20strong%20economy.pdf>

Massachusetts Municipal Association Testimony <http://www.mma.org/advocacy-mainmenu-100/letters-to-state-leaders/14517-mma-testimony-to-joint-committee-on-ways-and-means-urging-support-for-key-municipal-and-school-aid-programs>

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Sent by info@suburbancoalition.org in collaboration with



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masinfo mailing list

masinfo@lists.masc.org

<http://lists.masc.org/mailman/listinfo/masinfo>

Resolution Calling for Full Funding of the Foundation Budget Review Commission's Recommendations

Whereas the Massachusetts Foundation Budget Review Commission identified two areas (employee health insurance and special education) where the Massachusetts Foundation Budget significantly understates the true cost of educating students in the Commonwealth and has failed to keep pace with rising costs;

Whereas this underfunding means the cost of providing a quality education has increasingly been borne by local communities, most often at the expense of other vital municipal operations;

Whereas investing in education today leads to higher incomes, and thus less investment in police, prisons, subsidized health care, low income housing, welfare, etc. in the future;

Whereas state and local economies are most effectively strengthened "by investing in education and increasing the number of well-educated workers."

Therefore Be It Resolved that the **Arlington Board of Selectmen** calls on the Massachusetts Legislature and the Governor of Massachusetts to fully fund and adopt the recommendations of the Foundation Budget Review Commission in the immediate future.

Rationale: The Foundation Budget Review Commission (FBRC) was established by the Legislature in the FY16 budget and was charged with examining the Foundation Budget (Chapter 70) formula. The formula was first established as part of the Education Reform legislation in 1993 and has not been thoroughly reviewed or updated since that time. The FBRC found that the current formula understates costs significantly in two areas: Employee Health Insurance and Special Education.

If the recommendations of the FBRC had been implemented in the FY16 budget, state funding for education would have been about \$500 million more than it was. However, if Chapter 70 reflected the true cost of education, the number would be closer to \$2 billion.

Spending by school districts over the required Net School Spending amounts has increased, as a whole, for more than a decade, indicating that communities are using local property taxes and diverting funding from other portions of municipal budgets to fund their schools. In FY14, the total spending above Foundation in the state was \$1.7 billion. At the same time, the state's commitment to municipal aid has declined. Since 2001, unrestricted local aid has been cut by 43%. The net effect is a combination of cuts to local and school services and an increasing reliance on the regressive property tax.

The evidence overwhelmingly establishes the correlation between a well-educated workforce and higher income individuals. States that invest more in education have a higher paid workforce; also, states that increase the level of education of their population see greater productivity and higher wages over time. The link can then easily be made between higher paid individuals and less reliance on various forms of government assistance, as well as lower rates of crime.

A state's high school and college attainment rates are important factors in the state's overall economic strength. Additionally, investments in education can have significant long-term impacts on state and local economies, as well-educated individuals tend to stay relatively local and contribute tax dollars to the state and municipality in which they reside. In general, the taxes paid over time by these individuals are substantially higher than the cost of their public education.

Foundation Budget Review Commission

Final Report

October 30, 2015

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ACKNOWLEDGEMENTS

The Foundation Budget Review Commission is grateful to the many individuals and organizations that contributed to the completion of its study.

First and foremost, the Commission gratefully acknowledges the exceptional work and support provided by David Bunker, who was hired by the Commission in September to manage the Commission's remaining work and complete an analysis of the topics identified by the Commission in its preliminary report. The Commission benefited enormously from David's extensive expertise and research, and his work was invaluable to the final production of the Commission's report.

We would like to thank Melissa King and Roger Hatch from the Department of Elementary and Secondary Education's Office of School Finance, who have contributed an extraordinary amount of time and expertise to the work of the Commission. The cooperation of Melissa and Roger in providing data and running projections has been instrumental to the Commission throughout the course of its deliberations, and we wish to express our gratitude for their efforts and support.

We would also like to acknowledge the members of the Advisory Committee who contributed valuable knowledge, experience, and perspectives throughout the Commission's work.

Finally, the Commission is grateful to the many groups and individuals who provided policy expertise and insight through presentations at various Commission meetings, including Dr. Karla Baehr, Dr. Paul Dakin, the Rennie Center for Education Research & Policy, and the Massachusetts Budget and Policy Center.

Senator Sonia Chang-Díaz
Co-Chairs

Representative Alice H. Peisch

Foundation Budget Review Commission Membership

Commission Chairs

Senator Sonia Chang-Díaz, *Senate Chair of the Joint Committee on Education*

Representative Alice H. Peisch, *House Chair of the Joint Committee on Education*

Commission Members

Tom Moreau, *Secretary of Education Designee*

Commissioner Mitchell D. Chester, *Department of Elementary & Secondary Education*

Commissioner Tom Weber, *Department of Early Education & Care*

Representative Michael Moran, *Speaker of the House Designee*

Senator Patricia Jehlen, *Senate President Designee*

Representative Kimberly Ferguson, *House Minority Leader Designee*

Edward Moscovitch, *Senate Minority Leader Designee*

Paul Reville, *Governor Designee*

Evan Ross, *House Ways & Means Chair Designee*

Senator Sal DiDomenico, *Senate Ways & Means Chair Designee*

Mayor Kevin Dumas, *Massachusetts Municipal Association Appointee*

Joe Esposito, *Massachusetts Business Alliance for Education Appointee*

Patrick Francomano, *Massachusetts Association of School Committees Appointee*

Mary Bourque, *Massachusetts Association of School Superintendents Appointee*

Barbara Madeloni, *Massachusetts Teachers Association Appointee*

John Coleman Walsh, *American Federation of Teachers Massachusetts Appointee*

John Lafleche, *Massachusetts Association of Vocational Administrators Appointee*

Michael Wood, *Massachusetts Association of Regional Schools Appointee*

David Verdolino, *Massachusetts Association of School Business Officials Appointee*

Advisory Members (non-voting)

Mary Frantz, *League of Women Voters of Massachusetts Appointee*

Luc Schuster, *Massachusetts Budget and Policy Center Appointee*

JD Chesloff, *Massachusetts Business Roundtable Appointee*

Jennifer Francioso, *Massachusetts Parent Teacher Association Appointee*

Carolyn Ryan, *Massachusetts Taxpayers Foundation Appointee*

Jason Williams, *Stand for Children Massachusetts Appointee*

Chris Martes, *Strategies for Children Appointee*

Commission Staff

Jennie Williamson, *Research Director of the Joint Committee on Education*

Nathanael Shea, *Chief of Staff in the Office of Senator Sonia Chang-Díaz*

David Bunker, *Staff consultant to the Commission*

Overview

Mission

Sections 124 and 278 of the FY15 State Budget established the Foundation Budget Review Commission (Commission) to “determine the educational programs and services necessary to achieve the commonwealth’s educational goals” and to “review the way foundation budgets are calculated and to make recommendations for potential changes in those calculations as the commission deems appropriate.” In conducting such review, the Commission was charged with determining “the educational programs and services necessary to achieve the commonwealth’s educational goals and to prepare students to achieve passing scores on the Massachusetts Comprehensive Assessment System examinations.” The statute also directed the Commission to “determine and recommend measures to promote the adoption of ways in which resources can be most effectively utilized and consider various models of efficient and effective resource allocation.” In the FY16 State Budget, the Commission was granted an extension until November 1, 2015 to finish its work, and issue a final report.

The members of the Commission approached their work in the spirit of those who originally proposed the Education Reform Act of 1993, and the many from the educational, business, philanthropic, governmental, and civic communities who have advanced its work in a bipartisan and collaborative way since then. We are convinced that providing a high quality education to every student within the Commonwealth regardless of wealth, income, educational background, or zip code is not only a matter of constitutional obligation but of generational responsibility. It is not only the means by which our children grow into active participants in our democracy and productive members of our economy, but by which they are given the tools of self-reflection and personal growth that ensure happy, successful, and fulfilled lives that fully unlock their potential, utilize their skills, and realize their dreams. Massachusetts has made great strides since 1993 in realizing this kind of high quality public education. Indeed, on many metrics, the Commonwealth is the envy of many other states and industrialized countries. But reports from the field and the research community alike in recent years have suggested that the system is fiscally strained by the failure to substantively reconsider the adequacy of the foundation budget since 1993, and that the formula may need re-tooling to meet the needs of the 21st Century. Moreover, 22 years after the advent of education reform, the challenge we have not yet achieved desired results on is to deliver quality consistently to all geographies and all demographic groups across our state.

To meet these challenges, the Commission focused not only on identifying areas where the foundation budget and district spending might be poorly aligned or out-of-date, but asked questions about best practice, efficiency, and productivity, to ensure that gaps between foundation budget assumptions and actual spending were not simply filled because they existed, but were filled because exhaustive analysis showed that either maximum efficiencies had been sought, or that even maximizing efficiencies would not have allowed districts to fully close such gaps. The Commission also undertook its task recognizing that the Department of Elementary and Secondary Education (DESE) has, in recent years, consistent with both the original Education Reform Act, and subsequent amendments to the law, including the Achievement Gap Act of 2010, been ramping up efforts to hold districts and schools accountable for results, and to ensure that every effort is being made to identify, reduce, and eliminate remaining achievement gaps. It was a special moral and fiscal focus of the Commission’s, then, to make sure that the schools and districts most likely to be held accountable for bringing high-need students to proficiency, also had sufficient resources to meet those standards, and educate their high-needs populations to the same standards as other students by reviewing the adequacy and efficacy of the ELL and low-income rates in the formula.

Legislative Charge

SECTION 124. Chapter 70 of the General Laws is hereby amended by striking out section 4, as so appearing, and inserting in place thereof the following section:-

Section 4. Upon action of the general court, there shall periodically be a foundation budget review commission to review the way foundation budgets are calculated and to make recommendations for potential changes in those calculations as the commission deems appropriate. In conducting such review, the commission shall seek to determine the educational programs and services necessary to achieve the commonwealth's educational goals and to prepare students to achieve passing scores on the Massachusetts Comprehensive Assessment System examinations. The review shall include, but not be limited to, those components of the foundation budget created pursuant to section 3 of chapter 70 and subsequent changes made to the foundation budget by law. In addition, the commission shall seek to determine and recommend measures to promote the adoption of ways in which resources can be most effectively utilized and consider various models of efficient and effective resource allocation. In carrying out the review, the commissioner of elementary and secondary education shall provide to the commission any data and information the commissioner considers relevant to the commission's charge.

The commission shall include the house and senate chairs of the joint committee on education, who shall serve as co-chairs, the secretary of education, the commissioner of elementary and secondary education, the commissioner of early education and care, the speaker of the house of representatives or a designee, the president of the senate or a designee, the minority leader of the house of representatives or a designee, the minority leader of the senate or a designee, the governor or a designee, the chair of the house committee on ways and means or a designee, the chair of the senate committee on ways and means or a designee and 1 member to be appointed by each of the following organizations: the Massachusetts Municipal Association, Inc., the Massachusetts Business Alliance for Education, Inc., the Massachusetts Association of School Committees, Inc., the Massachusetts Association of School Superintendents, Inc., the Massachusetts Teachers Association, the American Federation of Teachers Massachusetts, the Massachusetts Association of Vocational Administrators, Inc., the Massachusetts Association of Regional Schools, Inc. and the Massachusetts Association of School Business Officials. Members shall not receive compensation for their services but may receive reimbursement for the reasonable expenses incurred in carrying out their responsibilities as members of the commission. The commissioner of elementary and secondary education shall furnish reasonable staff and other support for the work of the commission. Prior to issuing its recommendations, the commission shall conduct not fewer than 4 public hearings across regions of the commonwealth. It shall not constitute a violation of chapter 268A for a person employed by a school district to serve on the commission or to participate in commission deliberations that may have a financial impact on the district employing that person or on the rate at which that person may be compensated. The commission may establish procedures to ensure that no such person participates in commission deliberations that may directly affect the school districts employing those persons or that may directly affect the rate at which those persons are compensated.

SECTION 278. (a) The foundation budget review commission established in section 4 of chapter 70 of the General Laws shall file its report on or before June 30, 2015. A copy of the report and recommendations shall be made publicly available on the website of the department of elementary and secondary education and submitted to the joint committee on education.

(b) In addition to the membership listed in section 4 of chapter 70 of the General Laws and for the purposes of this review, there shall be 1 advisory nonvoting member of the foundation budget review commission from each the following organizations: the League of Women Voters of Massachusetts, the Massachusetts Budget and Policy Center, the Massachusetts Business Roundtable, the Massachusetts Parent Teacher Association, the Massachusetts Taxpayers Foundation, Stand for Children and Strategies for Children. Advisory members shall be informed in advance of any public hearings or meetings scheduled by the commission and may be provided with written or electronic materials deemed appropriate by the commission's co-chairs. Before finalizing its recommendations, the foundation budget commission established in said section 4 of said chapter 70 shall solicit input from advisory members who may offer comments or further recommendations for the commission's consideration.

Process and Method

To inform its deliberations, the Commission conducted six public hearings across the Commonwealth to solicit testimony from members of the public (*refer to Appendix A for a summary of public hearing comments*). The Commission also held seven meetings between October 2014 and June 2015, during which members examined relevant research and considered information and data presented by various stakeholders (*refer to Appendix B for a summary of the Commission meetings and a list of documents reviewed at each meeting*). At the end of this period, recommendations were made and accepted relative to the foundation budget assumptions regarding health insurance and special education.

In September, the commission was able to hire a researcher and staff person, and instructed that the focus of remaining work be on identifying ways to reduce the achievement gap among low income students and English language learners by examining whether the existing additional amounts required by the formula are sufficient to meet the needs of those districts as defined by 2015 pedagogical standards and best practice. Multiple sources of evidence were considered in this phase of the work, including a review of national literature and research, as well as other state funding formulas, to determine whether our ELL and low income weightings in MA were adequate or in a reasonable national range, and interviews with superintendents, business managers, and teachers in MA districts that have found success in turning around schools and reducing or eliminating the achievement gap for high needs students. Given that insufficient time remained for either a professional judgment panel or a successful schools study, the commission's hope was that the principles underlying both models could be respected by seeking the advice, counsel, and professional judgment of those who had achieved some initial success at meeting the educational needs of ELL and low income students. The multiple sources of evidence gathered in this way are reflected in the additional recommendations made in this report relative to low income and ELL increments.

Finally, a number of areas remained in which the Commission either did not have time to carry out the due diligence needed to make an informed recommendation, or believes that current efforts and pilot programs must be continued and their results reviewed before any final inclusion of related costs in the Chapter 70 funding formula.

Findings & Recommendations

– PART A –

Foundation Budget Changes

The Education Reform Act of 1993 established the foundation budget to ensure adequate funding for all students in Massachusetts. Since then, some of the assumptions contained in the formula for calculating the foundation budget have become outdated. In particular, the actual costs of health insurance and special education have far surpassed the assumptions built into the formula for calculating the foundation budget.¹ As a result, those costs have significantly reduced the resources available to support other key investments. In addition, the added amounts intended to provide services to ELL and low-income students are less than needed to fully provide the level of intervention and support needed to ensure the academic and social-emotional success of these populations, or to allow the school districts serving them to fund the best practices that have been found successful.

I. Health Insurance

Findings

Actual spending on employee health insurance far exceeds the current foundation budget allotment for such costs, as noted in several recent studies.² Statewide, district spending on “Employee Benefits & Fixed Charges” exceeds the foundation budget allotment by more than 140%.³ This is primarily due to the dramatic growth in health insurance costs nationwide and the fact that such costs have increased at a significantly higher rate than the rate of inflation used to adjust the foundation budget. In addition, the “Employee Benefits & Fixed Charges” component of the foundation budget does not include retiree health insurance, even though districts or communities incur such costs.

In developing the below recommendations, the Commission leveraged the collective expertise of its members to engage in discussions about how to address the discrepancy between the foundation budget and actual spending on health insurance. To inform such discussions, the Commission reviewed the factors encompassed in the “Employee Benefits & Fixed Charges” component of the formula, examined data on municipal health insurance trends, and reviewed information regarding the participation of school district employees in the state’s Group Insurance Commission (GIC) health plans.

Recommendations

1. Adjust the employee health insurance rate captured in the “Employee Benefits/Fixed Charges” component of the formula to reflect the average⁴ Group Insurance Commission (GIC) rate*;

¹ Recent studies have estimated the gap between foundation and actual spending in these categories to be as high as \$2.1 billion combined (Massachusetts Budget & Policy Center, “Cutting Class: Underfunding the Foundation Budget’s Core Education Program,” 2011; Massachusetts Business Alliance for Education, “School Funding Reality: A Bargain Not Kept,” 2010; Massachusetts Department of Elementary & Secondary Education, “Report on the Status of the Public Education Financing System in Massachusetts,” 2013).

² Ibid.

³ Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

⁴ While the Commission recommends using the average rate, it acknowledges that there may be other benchmarks that the Legislature may find more appropriate.

*The increment representing the other parts of the “Employee Benefits/Fixed Charges” component would remain the same.

2. Add a new category for “Retired Employee Health Insurance” to the foundation budget; and
3. Establish a separate health care cost inflation adjustor for the employee health insurance portion of the “Employee Benefits/Fixed Charges” component of the formula, based on the change in the GIC rates.

II. Special Education

Findings

Foundation enrollment accounts for the additional costs of providing special education services through an assumed rate of district enrollment, rather than an actual count of students. A district’s foundation enrollment is multiplied by 3.75% to add additional special education resources to the foundation budget. This translates to an assumption that 15% of students receive in-district special education services 25% of the time.⁵ In actuality, around 16% of students receive some level of in-district special education services statewide⁶, which suggests that the foundation budget understates the number of in-district special education students. Out-of-district special education enrollment is assumed at 1% of foundation enrollment, which mirrors the rate of out-of-district special education placements statewide. However, districts spend far more on special education tuition for out-of-district placements than what is allocated through the foundation budget. In FY13, actual costs were 59% higher than the foundation budget rate of \$25,454.⁷ To address the fact that the foundation budget understates the number of in-district special education students and the cost of out-of-district special education, the Commission has developed the below recommendations.

Recommendations

1. Increase the assumed in-district special education enrollment rate from 3.75% to 4.00% (for non-vocational students) and 4.75% to 5.00% (for vocational students)
 - *Current assumption (3.75%) = 15% of students receiving SPED services 25% of the time*
 - *Proposed change (4.00%) = 16% of students receiving SPED services 25% of the time*
2. Increase the out-of-district special education cost rate to capture the total costs that districts bear before circuit breaker reimbursement is triggered. One example of how this might be done is to increase the out-of-district special education cost rate by an amount equal to the following:

$$[4 \times \text{statewide foundation budget per-pupil amount}] - [\text{statewide foundation budget per-pupil amount}^{**} + \text{out-of-district special education cost rate}]^{***}$$

⁵ 15% x 25% = 3.75%

⁶ Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

⁷ Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

^{**} Not including assumed SPED costs.

^{***} This would be a one-time adjustment, with the resulting rate increased by inflation each year thereafter.

III. Budget Impact Summary: Health Insurance and Special Education Changes

Statewide Summary	GAA	25% Phase in	Difference	100%	Difference
	FY16	FY16		FY16	
Enrollment	942,120	942,120	0	942,120	0
Foundation budget	10,090,177,272	10,340,927,612	250,750,340	10,912,226,442	822,049,170
Required district contribution	5,943,909,031	6,002,726,108	58,817,077	6,080,502,587	136,593,556
Chapter 70 aid	4,511,521,973	4,607,300,066	95,778,093	4,943,298,626	431,776,654
Required net school spending (NSS)	10,455,431,004	10,610,026,174	154,595,170	11,023,801,213	568,370,210

The chart above illustrates the estimated impact of the Commission's recommended adjustments to the foundation budget categories for health insurance and special education, expressed both as a one year cost and based on a four year phase-in. Note that because of the structural changes recommended to both the ELL and low income rates below, further work would be needed to ensure that the Chapter 70 spreadsheets accurately reflected those changes. Those recommendations would also entail an increase in the amount of Chapter 70 aid, not reflected in this chart. In addition, if the legislature chose to incorporate any of the issues raised in Part C of this report as being worthy of further study and consideration, the final cost to the state would increase further.

IV. English Language Learners

Findings

A review of national literature showed that the weights for states with funding formulas that made adjustments for ELL students had weightings of between 9.6% and 99%. Although Massachusetts uses rates rather than weightings, those rates contain an implied weighting of between 7% and 34%. In general, then, MA weightings for ELL are well within the national range, with the exception of the high school rates of 7% and 40% respectively.

Although the origin of the high school rate differential is based in legitimately different class size assumptions in a historic iteration of the formula, it presents a challenge to the effective provision of services to the ELL population. A consistent point made by the superintendents and educators with whom we spoke was the sharp rise in students with interrupted education (SIFE) and students with limited or interrupted formal education (SLIFE), often children from war torn regions, or refugees, who have serious social and emotional needs, and arrive at school with little to no formal education for school districts to build upon. This challenge is exacerbated at the high school level, where such gaps in learning must be made up in an extremely short time frame, often with highly staff-intensive interventions involving class size of 10 or less per teacher, and support staff as well. Next, vocational schools which serve significant numbers of ELL students have frequently pointed out to the Commission that they receive no additional support in meeting their students' needs through the formula, because the ELL student amount is calculated as a base rate per student rather than as an added

increment. Therefore, no ELL increment is applied to the vocational foundation budget, despite the significant needs some vocational districts face in educating this population. Finally, smaller districts and their advocates urged that funding and flexibility remain in the formula in recognition of the fact that they too often have ELL learners, but, due to low incidence, may meet those needs in creative and cost-sharing ways with other districts.

Recommendations

1. Convert the ELL increase from a base rate to an increment on the base rate.
2. Apply the increment to vocational school ELL students as well.
3. Increase the increment for all grade levels, including high school, to the current effective middle school increment of \$2,361. This would increase the range of ELL-only weightings and expand available funds for staff-intensive high school age interventions.

V. Low-Income Students

Findings

Recommended weightings for low income students in the national literature range from an (admittedly conservative) 40% more than the base per student rate to 100% more. The low income increments in MA range from 32% at the high school level to 50% at the junior high/ middle school level, with low income ELL running between 30% and 84%. In our effort to determine where in the broader range of weightings MA should fall, the Commission reviewed the testimony made at public hearings and undertook focused interviews with successful educators in the fall. Among districts which had successfully carried out turnaround efforts, either district wide, or at select schools within the district identified as Level Four schools, many common themes and best practices emerged as worthy of replication in the effort to better meet the needs of ELL and low income learners, and reduce remaining achievement gaps, a few of which follow:

1. Extending the school day or year: This was among the top of the strategies identified as having been successful in the schools where it is tried. It is often extended to allow both more learning time for students, and common planning time for teachers and staff. More time is frequently viewed as essential to overcome existing deficits in learning and achievement.
2. Social and Emotional Needs/ Mental and Physical (including Oral) Health: Although educators are quick to stress that social and emotional needs are different and distinct from mental health, almost everyone interviewed stressed that the growth of need in this area has been staggering. Many asserted that they could not have accurately predicted in 1993, or even ten years ago, how much more effort and cost would be needed to ensure an adequate supply of social workers, guidance and adjustment counselors, wraparound coordinators, and other staff to ensure that the needs of their students are met, and that students arrive school stable and ready to learn.
3. Instructional Improvement: Improving instruction is usually key to any successful school turnaround, and several strategies emerge as valuable here: increased and improved professional development, common planning time for teachers and staff, and the use of instructional teams and instructional coaches.
4. Targeted Class Size Reductions for the Highest Need Populations: Although the formula's assumptions for K-3 class size, and for high needs students, are fairly low, several educators stressed that, for certain of the highest need populations, such as the SIFE/SLIFE ELL students mentioned above, or other high

school students with significant gaps to redress in a short time, or students with significant social-emotional needs, or who are at high risk of dropping out, or have a high history of truancy, who need intensive staff attention to help keep them in school and on task, class sizes lower than 10 to 1 were often necessary to increase achievement rapidly.

5. Early Education: Full Day Kindergarten and Full Day Pre-K. Many of the educators indicated both that bringing full day K into their districts had significantly impacted and improved school readiness, and that high on their wish list was the extension of full day pre-K and other early learning services in their districts.

For some of these strategies, the Commission was presented with solid and detailed estimates for what these implementations cost. MA 2020 presented evidence that extended learning time (or ELT) costs approximately \$1300-1500 per student. The Mass Budget and Policy Center (MBPC) presented a costing out of comprehensive wraparound services that was estimated at \$1300 per student. Worcester school officials presented evidence that their successful efforts at turning around Level 4 school cost about \$2000 more per student than other schools in the district received. Other strategies proved more elusive to cost out, although the range of weightings found in literature ranged from a conservative 40% in the Education Trust review, to 50% in the work of the Education Reform Review Commission of 2002, to almost 100% in Maryland. It was also clear from our interviews and emerging practices in other states that districts with the highest concentrations of poverty had a correspondingly high need for funding. The fact of concentration of challenging populations itself caused a change in the asset mix available to, and the expenditures required of, districts. They especially needed the educational and pedagogical synergies created by making more than one reform happen at a time.

The other challenge faced by the Commission was this: No one strategy or group of strategies is used consistently in every school district, but no model district limited so itself to one strategy only. Successful districts, and successful school turnarounds, require multiple concurrent, overlapping and reinforcing strategies, the exact details of which will vary from district to district. The question before the Commission was: How shall we account for the varying costs of diverse strategic educational choices through a standardized formula without simply summing the costs of every possible strategy, or limiting districts to one strategy at a time? The recommendations below attempt to find a way through that question by recommending that the low income increment be increased based on concentration of poverty, and that the poorest districts be provided enough per student to ensure that two to three reforms might be carried out simultaneously.

Recommendations

1. Increase the increment for districts with high concentrations of low income students. The Legislature will need to determine specific increments based on further review of data and debate, but based on its review of national literature, practices in other states, and model districts within our own state, the Commission offers the guidance that that weighting should fall within the range of 50%-100% and that multiple concurrent interventions are necessary to effectively close achievement gaps. The final decision should provide high poverty school districts with enough funding to pursue several turnaround strategies at once.
2. Ensure that any new definition of economically disadvantaged (necessitated by districts' shift away from collection of free and reduced school lunch eligibility data) properly and accurately count all economically needful students.
3. Leave the exact calculation of each increment to legislative action.
4. Require each district to post a plan online, on a highly accessible and visible state website as well as their district site, about how it will use the funds calculated in the ELL and low income allotments to serve the

intended populations, what outcome metrics they will use to measure the success of the programs so funded, performance against those metrics, and, subsequently, the results of the funding on improving student achievement. The plan will be public, but not subject to approval by DESE. The plan, which can be part of required school improvement plans, should detail how funds are being used to improve instructional quality, and/or ensure that services are provided that allow every student to arrive at school physically and mentally healthy, with their social and emotional needs met, and ready to learn.

5. Consistent with testimony provided to the Commission, the interviews conducted by Commission staff, and a national literature review to identify best practices, we anticipate that districts will use funding flexibility for one or more of the following best practices: a) expanded learning time, in the form of a longer day and/or year, and inclusive, where appropriate, of common planning time for teachers, b) wraparound services that improve and maintain the health of our students, including social and emotional health and skills, mental health and oral health, c) hiring staff at levels that support improved student performance and the development of the whole child, d) increased or improved professional development rooted in pedagogical research, and focused on instructional improvement, including evidence-based practices such as hiring instructional coaches, e) purchase of up-to-date curriculum materials and equipment, including instructional technology, and f) expanding kindergarten, pre-school, and early education options within the district.

– PART B –

EFFICIENT AND EFFECTIVE RESOURCE ALLOCATION

In the course of deliberations, Commission members often found themselves desiring even more detailed information than that immediately available. In addition, in approving foundation budget increases, they wanted to ensure the funding was used effectively and accountably to meet the educational needs of our most vulnerable children and high needs students. The first part of the recommendations below represents specific recommendations relative to the low income and ELL increment increases proposed in Part A of this report, and about school-based budgeting, the second part is the recommendation of a data working group that made recommendations to the Commission in September, and the third section contains the recommendations of the Commission relative to early education.

Data Collection Recommendations

1. Establish a data collection and reporting system that tracks funding allocated for ELL and Low Income students to ensure that spending is targeted to the intended populations, and to provide a better data source to future Foundation Budget Review Commissions about the accuracy and adequacy of the low income and ELL increments.
2. Establish a data collection and reporting system that allows for greater access to school-level expenditures and data across all districts to increase the understanding of state level policy makes about effective school-level interventions and investments, and which connects that data to student achievement data so more informed decisions can be made about the productivity, efficiency , and effectiveness of state expenditures.

Stakeholder Data Advisory Group Recommendations

1. *Establish Stakeholder Data Advisory Committee*
The Department of Elementary and Secondary Education (DESE), in collaboration with the Executive Office of Education (EOE), should convene a Stakeholder Data Advisory Committee to promote effective resource allocation decisions at the local level
2. *Purpose of Data Advisory Committee*
The Data Advisory Committee will assist DESE to identify, implement and assess cost-effective ways to achieve three goals:
 - a) Streamline financial reporting, eliminate duplicate reporting requirements, and improve data quality
 - b) Strengthen DESE capacity to analyze and report staffing, scheduling and financial data in ways that support strategic resource allocation decisions at the district and school level
 - c) Strengthen district capacity to use data to make strategic resource allocation decisions
3. *Reports to the Board and Joint Education Committee*
The Data Advisory Committee will report its progress to the Board of Elementary and Secondary Education and to the Co-chairs of the Joint Committee on Education at least semi-annually, and will make such recommendations for new funding as are necessary for DESE to achieve the goals.
4. *Work of the DESE*
DESE actions to achieve these three goals may include:
 - Work with MTRS to obtain individual teacher salary information

- Develop strategies for securing more school-level financial data, including, where appropriate, developing ways to apportion more district expenditures to schools automatically
- Improve data accuracy by identifying more ways to “automate” the identification of “outlier” data on EPIMS staffing and EOY financial reports from districts to prompt district review
- Strengthen its training for district staff to improve accuracy and consistency of data reporting with special attention to: a) the use of clear and consistent definitions, and b) expected use of “Reports Tab” to explain significant changes and/or “outlier” data
- Eliminate duplication of effort at state and local levels by: a) aligning finance data with staffing (EPIMS) and enrollment (SIMS) data collections, and b) aligning grants management and reporting with EOY financial reporting
- Identify potential models, requirements, impacts, and estimated cost for a new financial reporting system
- Develop more powerful, actionable and publicly-available information and reports that combine and benchmark staffing, scheduling, and district/school-level funding data to support strategic resource allocation decisions at the local level
- Expand research focused on identifying promising practices for efficient and effective district and school resource allocation
- Collaborate closely with MASBO and MASS to develop the on-line (and other) training and support that DESE, education collaboratives, and local district and school staff need to make effective use of the current and new data and research
- Take other actions deemed necessary to achieve the goals

5. *Implications for Future State Funding*

Many of the above actions will require a cost-benefit analysis of a range of options. For some chosen options, new state funding will need to be recommended and secured.

Early Education

High-quality preschool is an effective practice identified by most school districts as one which increases the school readiness of students, especially high need students, and which is therefore worthy of further consideration and action by the legislature as it updates the structure and financing of public education for the 21st Century. While the Commission did not have sufficient time or resources to undertake specific recommendations on early education, it was a practice that was frequently highlighted in both national literature and in feedback from model districts within the Commonwealth—both for closing achievement gaps for disadvantaged students and in reducing special education costs for districts and the state. The state is currently using federal funds from the Preschool Expansion Grant (PEG) program, and some supplemental state funds, to examine and explore ways in which early education can be provided and expanded through the existing and robust mixed delivery system of public and private providers. As it considers whether the Chapter 70 funding formula can be adapted appropriately as a funding vehicle for the ongoing provision of pre-school, the Commission encourages the Legislature to incorporate the implementation wisdom gained through the PEG pilot programs and the Commonwealth’s other early education program, quality, and access initiatives as it rolls out any effort to provide these services more widely.

– PART C –

OTHER

The Commission wishes to make the following observations and recognitions, which due to time constraints, and limited resources, it has been unable to address more extensively:

I. IN-DISTRICT SPECIAL EDUCATION

A review at the September meeting of in-district SPED spending data confirms that the average expenditure per pupil exceeds the rate currently included in the foundation budget, and that, even upon adoption of the changes recommended in this report, a gap will remain of approximately \$700M between foundation budget assumptions, and district reported spending, and between foundation budget assumptions about staffing (assuming 4,394 teachers, or 8 special education FTEs to one teacher), and current practice (9,915 special education teachers, or approximately 5 special education FTEs to one teacher). Some evidence and testimony was presented that the central change driving this gap was that the original foundation budget for in-district special education was built on a model of substantially separate instruction, which has changed significantly over time to reflect the growing use of inclusion as the preferred pedagogical model in the Commonwealth. Since that model involves special education students spending most or all of their day in regular education classrooms, with special education (and para-professionals) coming into the classroom to provide extra help for struggling students, the working hypothesis of several Commissioners is that the added staffing needs of that model account for the significant difference in staffing and funding levels between the foundation budget and reported spending. Commissioners also noted the following challenges related to the data as presented: a) actual reported special education costs, including the counting of staff FTEs, don't line up precisely with functional categories in the foundation budget, and b) not all functional categories are collected by program, leaving key data missing for special education. In addition, some Commissioners expressed a desire for a more detailed review of district practice to confirm that inclusion, and its broad adoption at the district level, is the chief reason for any remaining funding shortfall, and to further examine how best to account for reported costs that may be shared between regular and special education. The Commission simply did not have sufficient time or resources to further analyze and review district teaching and funding practices in order to inform more specific recommendations. The gap between the foundation budget in-district SPED rate and actual district-level per pupil costs needs further attention by the legislature, in order to ensure that Chapter 70 supports best practices in creating and maintaining a 21st century special education system.

The Commission further notes that, while any increase made to the foundation budget to reflect special education costs would result in increased Chapter 70 aid for many districts, such additional funding would not need to be spent on special education services solely. Because special education is a legal entitlement, districts must fund individual education plans for all students in special education. Therefore, any gap between the foundation budget categories and actual legal obligations results in funds being diverted from other instructional priorities of the district to fund obligatory special education costs. Any increase in the Chapter 70 assumptions about special education that increases Chapter 70 aid to a district also frees up "other" funds currently being spent on special education services, and allows districts to make a broader set of investments in core instructional services and other supports that benefit the entire learning community of that district, should the district so choose. It is the expectation of the Commission that by more accurately reflecting special education (and health insurance costs) in the Chapter 70 formula, the Legislature will make possible numerous exciting reforms and instructional improvements that are currently beyond the fiscal capacity of the Commonwealth's school districts.

II. INFLATION FACTORS

The Commission also recognizes that, although the Chapter 70 formula contains an inflation adjustment, which has been applied in most years since 1993, in 2010, faced with a sharp downturn in revenues, and the serious budget challenge that resulted, the final budget used a lower inflation number (3.04%) from a different quarter than the quarter required by statute (6.75%). A correction for this “missed” quarter that acknowledges the statutory cap on inflation of 4.5% results in an adjustment of 1.4 % in FY16, and would have required additional Chapter 70 aid of almost \$55 million. A correction that suspended the statutory cap results in an adjustment of 3.6 % in FY16, and would have required additional Chapter 70 aid of almost \$158 million. Note, however, that these estimates were calculated separately from the recommendations made in Part A of this report. Were those changes adopted, there would be no need to make a corrective fix to those elements of the formula, which would lower the estimates above, and allow an inflation adjustment to be made to remaining categories for a lower cost in Chapter 70 aid.

– PART D –

CONCLUSION AND NEXT STEPS

As the Commission's work draws to a close, the legislature's work begins. We submit this report to the legislature with full recognition of the continued fiscal challenges of the Commonwealth, and the many competing priorities, and worthwhile goals, that the legislature must balance in crafting the annual state budget. We recognize that recommendations of this scope and size will need to be phased in to be affordable. However, we also note again what was stated at the beginning of this document: that the good work begun by the education reform act of 1993, and the educational progress made since, will be at risk so long as our school systems are fiscally strained by the ongoing failure to substantively reconsider the adequacy of the foundation budget. We therefore urge that the legislature act on these recommendations with a profound sense of the risks and opportunities at stake for our shared prosperity as a state and, as our constitution acknowledges, the critical nature of education to the health of our democracy. We advise a keen sense of the urgency when it comes to addressing the identified funding gaps, and the moral imperative of reducing the remaining achievement gaps.

The Commission also hopes, after passage of any revisions to Chapter 70, that careful and continued attention will be paid to the adequacy of the foundation budget, to the effectiveness of the implementation of any Chapter 70 revisions, and to best practices that emerge over coming years. We encourage the legislature to make the work of the Commission recurring, on some regular interval of years as was originally envisioned by the 1993 Act, since both pedagogical wisdom and relevant changes in our economy and society will always be emerging. We hope that, with the assistance of such a reconvened commission, the legislature will be in a position to act expeditiously on any new fiscal needs or implementation challenges that have arisen in the interim, or new strategies that permit more efficient and effective use of funds. Noting the challenges and frustrations faced by this Commission as the result of a lack of dedicated and funded staff, we strongly recommend that dedicated and timely funding be provided to any future Commission to allow a rigorous review of available data to make decisions that are in best long term interests of the Commonwealth both fiscally and educationally.

Education reform in Massachusetts is now 22 years old, and its strength has derived from a solid bipartisan commitment both to high academic standards and to providing adequate funding to allow districts to meet those standards. As a Commission composed of members from the educational, business, philanthropic, governmental, and civic communities, we hope that our proposals represent another step in that journey towards academic excellence and educational equity, and we look forward to continuing our work together to see these changes enacted and signed into law.

Appendix A

The Commission held six public hearings across the state to solicit testimony from members of the public. A summary of the main themes and issues that were raised during the public hearings are listed below. *This list reflects the testimony heard at the public hearings only and is not meant to convey the Commission's formal findings or recommendations.*

Public Hearings Summary

- Actual spending on Special Education and Health Insurance far exceeds the foundation budget assumptions. As a result, foundation spending is consumed by these under-funded fixed charges, leaving less funding available to support other educational programs.
- Need to increase funding for at-risk students – especially low income and ELL students.
- The foundation budget does not provide sufficient resources to address the mental health needs of today's students.
- The foundation budget should provide greater support for wraparound services.
- The Commission should examine district allocation practices and efforts to remove barriers to efficient and adaptive uses of funds.
- Technology should be included in the foundation budget as such costs were not envisioned in the original foundation budget.
- The Commission should propose changes to simplify and clarify the foundation budget to make it easier for citizens to understand how funds are spent and whether these are bringing about results.
- Money should follow the student at the school level, to ensure that additional aid is being spent on the students who it is intended to benefit.
- Reconsider the use of October 1st enrollment data to calculate foundation budgets, which is especially problematic for districts that experience significant fluctuations in student enrollment throughout the year.
- The current method of funding charter schools is creating significant and growing financial difficulty for municipalities and school districts.
- The Commission should consider whether there is sufficient funding in the foundation budget for building maintenance.
- The foundation budget formula does not account for the cost of unfunded mandates.
- Need a better enforcement mechanism and/or greater clarity regarding a municipality's obligation to appropriate sufficient funds to meet the required local contribution.
- Transportation should be included and funded in the foundation budget.
- Need to address "equity" issues – the Commission should review and adjust the local contribution and school aid calculation factors in the Chapter 70 formula.
- The Commission should address concerns surrounding vocational education – i.e. how vocational education students are recruited and accepted, how tuition is calculated, and the high cost of student transportation.
- The foundation budget should include funding for school libraries.
- The foundation budget should account for the differences in costs among smaller, rural districts.

Appendix B

Summary of Commission Meetings & Materials

Meeting # 1: October 9, 2014

Commission members reviewed the charges set forth in the authorizing legislation (*Sections 124 & 278 of Chapter 165 of the Acts of 2014*), viewed a presentation on the foundation budget formula entitled “Measuring Adequacy – the Massachusetts Foundation Budget” prepared by Melissa King and Roger Hatch from the Department of Elementary & Secondary Education (DESE), and discussed the public hearing schedule. Commission members received the following materials: A copy of the authorizing legislation (*Section 124 & 278 of Chapter 165 of the Acts of 2014*), a summary of the authorizing legislation, and a copy of the power point presentation entitled “Measuring Adequacy – the Massachusetts Foundation Budget”.

Meeting #2: March 10, 2015

Commission members viewed a presentation on special education and health insurance entitled “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance” prepared by Melissa King and Roger Hatch from DESE, viewed a presentation on municipal health insurance trends prepared by Carolyn Ryan from the Massachusetts Taxpayers Foundation, and reviewed the Commission’s meeting schedule and timeline. Commission members received the following materials: a copy of the power point presentation entitled “the Massachusetts Foundation Budget: Focus on Special Education and Health Insurance”, a copy of the power point presentation entitled “Municipal Health Insurance Trends”, and a copy of the Commission’s meeting schedule.

Meeting #3: March 27, 2015

Commission members viewed a presentation on the other foundation budget categories and differences in spending among districts entitled “Further Analysis of the Foundation Budget” prepared by Melissa King from DESE, viewed a presentation on the wage adjustment factor prepared by Melissa King from DESE, and considered information provided by DESE Commissioner Mitchell Chester on the relationship between spending and student outcomes. Commission members received the following materials: a copy of the power point presentation entitled “Further Analysis of the Foundation Budget”, a copy of the power point presentation entitled “Wage Adjustment Factor”, and a list of school districts by wealth and low-income quintile.

Meeting #4: April 14, 2015

Commission members viewed a presentation on evidence-based strategies for improving student outcomes entitled “Building a Foundation for Success” prepared by Chad d'Entremont and Luc Schuster from the Rennie Center and Mass Budget and Policy Center, considered information provided by Dr. Paul Dakin (Superintendent of Revere Public Schools) regarding the various investments and programs that have yielded positive outcomes in Revere, and discussed the process for reviewing and voting on recommendations that would be included in the Commission’s final report. Commission members received the following materials: a copy of the power point presentation entitled “Building a Foundation for Success”, and a handout on Revere Public Schools provided by Dr. Paul Dakin.

Meeting #5: May 5, 2015

Commission members viewed a presentation on effective resource allocation entitled “Effective & Efficient Resource Allocation: A Framework to Consider” prepared by Dr. Karla Baehr, discussed and approved changes to the Commission’s timeline and work plan, and reviewed a draft proposal containing recommendations for

health care and SPED adjustments. Commission members received the following materials: a copy of the power point entitled “Effective & Efficient Resource Allocation: A Framework to Consider”, a copy of the work plan proposed by Senator Chang-Díaz, and a copy of the draft recommendations for health care and SPED adjustments.

Meeting #6: June 9, 2015

Commission members reviewed and approved final recommendations for Health Care and SPED adjustments, considered proposals relative to full-day preschool and accountability, and discussed the other topics to be considered by the Commission during its extended deliberations. Commission members received the following materials: a copy of the final recommendations for health care and SPED adjustments, a document containing draft proposals relative to full-day preschool and accountability, and a copy of the Commission’s updated work plan.

Meeting #7: June 23, 2015

Commission members reviewed and approved edits to the preliminary report, discussed the process and methodology for analyzing the other topics to be considered during the Commission’s extended deliberations, and reviewed information presented by Roger Hatch from DESE on school-based data collection. Commission members received the following materials: a draft of the preliminary report, a document explaining the foundation budget comparison tool developed by Commission member Ed Moscovitch, and a document on school-level finance data.

Meeting #8: September 28, 2015

Commission members were introduced to David Bunker, who was hired by the co-chairs to staff the commission and draft the final report. They also reviewed and commented on his work plan, which was centered around examining the adequacy of the low income and ELL adjustments in the formula. Melissa King of DESE gave a presentation on in-district special education costs, members held a discussion on the “accountability” and “conditions” recommendations, and Dr. Karla Baehr gave a presentation of potential recommendations on data collection, which were unanimously approved by Commission members. Commission members received: a copy of the agenda, a copy of the work proposal prepared by David Bunker, a copy of the Power Point presentation on “In District Special Education Costs” by Melissa King, a document prepared by Dr. Karla Baehr containing recommendations to support effective and efficient allocation of resources, and a document containing a list of the “Accountability” proposals that the Commission has considered to date.

Meeting #9: October 16, 2015

Commission members reviewed the recommendations of David Bunker regarding the low income and ELL adjustments. They also discussed the issue of efficient resource allocation and reporting on spending. Finally, they had a follow-up discussion about in-district special education, and other remaining concerns expressed by Commission members.



Town of Arlington, Massachusetts

Vote: Minuteman Building Project Assessment Task Force

Summary:

Daniel J. Dunn, Selectman

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Minuteman_ref..docx	Memorandum from Selectman Dunn

By the middle of next week (March 1st) we will know whether or not the new Minuteman regional agreement has been approved. If it is not approved, Arlington's path is clear: we should disapprove the proposed building project, and fight it at Town Meeting and on the ballot question that Minuteman will call.

However, if the regional agreement is approved, we will need to carefully evaluate the building project being proposed by Minuteman. This is an unusual approval process, and it's not one that we as a town have any recent experience with. Every other building project in town comes from one of two places: the school department or the Town Manager. When these projects happen, we have an established process of advocacy and evaluation. We don't have such a process for projects like Minuteman.

I've talked this question over with a number of people in town, and this proposal is particularly driven by the advice of Charlie Foskett.

I propose that the Board of Selectmen create a Minuteman Building Project Assessment Task Force at our next meeting on March 7th. The membership I'm proposing is a set of people who are particularly knowledgeable about Arlington's finances, Arlington's education system, Minuteman, and/or school building projects. I'm suggesting we wait two weeks to create the task force so that we can get feedback on the membership and charge, and be sure that the regional agreement has been approved.

Proposed membership:

Selectman Dan Dunn

Selectman Joe Curro

Finance Committee Chair Al Tosti

Finance Committee's Minuteman Sub-Committee Member Stephen DeCoursey

Capital Planning Committee Chair Charlie Foskett

Minuteman School Committee Member Sue Sheffler

Minuteman School Building Committee Member Nawwaf Kaba (pending final appointment)

Arlington Public School Superintendant Kathie Bodie (or designee)

Minuteman Superintendant Ed Bouquillon (or designee)

The task force shall also be advised by Town Counsel Doug Heim.

The Task Force's charge:

Arlington holds the education of our children as one of our most important obligations and priorities. That commitment includes providing high-quality vocational education to the students who choose it. As with all town priorities, vocational education must be considered within the constraints of our town's ability and willingness to pay.

Towards that end, the task force should consider the proposed Minuteman building project and recommend what actions should be taken. These considerations should include the capital plan, Arlington's public schools, all potential revenue sources, and any other area the task force finds to be useful and relevant.

The Task Force should research and deliberate with appropriate haste such that it can educate, inform, and make recommendations to the relevant committees and boards in preparation for Special Town Meeting on April 27th,

2016. The Task Force will be disbanded at the conclusion of the regular Town Meeting of 2016.



Town of Arlington, Massachusetts

Articles for Review:

Summary:

Article 18: Bylaw Amendment/Expanding Equal Protection
Article 19: Bylaw Amendment/Arlington Human Rights Commission Executive Director
Article 20: Bylaw Amendment/Arlington Human Rights Commission Chairpersons
Article 21: Bylaw Amendment/Arlington Commission on Arts and Culture Membership
Article 25: Bylaw/Demolition by Neglect of Historic Buildings
Article 28: Vote/Authorizing Community Choice Aggregation

ATTACHMENTS:

Type	File Name	Description
Reference Material	WA_Text_18__19__20__21__25__28.docx	Warrant Article Text Town Counsel Memo
Reference Material	TC_Memo_Re_2016_Warrant_Articles_18__19__20__21__25_and_28_for_2.22.16_Meeting_(2).pdf	2.17.16 re Articles# 18, 19, 20, 21, 25, 28
Reference Material	Ref_Mat_2.22.16_W.A._#18_AHRC_M._Goldsipe.pdf	W.A. #18 Comments AHRC M. Goldsipe
Reference Material	W._A._#19_Comments_AHRC._W._Logan.docx	W.A. #19 Comments AHRC Exec. Director W.Logan
Reference Material	Ref_Material_ACAC_request_Feb2016.docx	W.A. #21 Comments ACAC Membership B.Costa
Reference Material	Demo_by_neglect_for_Selectmen_s_packet.docx	W.A. #25 Comments Demo by Neglect C. Kowalski
Reference Material	10_reg_voter_article_ltr.pdf	Letter sent to 10 registered voter article 25

ARTICLE 18 BYLAW AMENDMENT/EXPANDING EQUAL PROTECTION

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws to promote equality by amending the Arlington Human Rights Commission's stated purpose to include additional and more comprehensive protected classes of persons and further to authorize the Commission to take action within the scope of its powers defined therein to protect and promote equality for such additional and more comprehensive protected classes of persons; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

ARTICLE 19 BYLAW AMENDMENT/ARLINGTON HUMAN RIGHTS COMMISSION EXECUTIVE DIRECTOR

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws to modify and clarify the position of Executive Director to the Commission, including the conditions and process of appointment; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

ARTICLE 20 BYLAW AMENDMENT/ARLINGTON HUMAN RIGHTS COMMISSION CHAIRPERSONS

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws (Section 3.E.1 Executive Director, Officers, Quorum and Adoption of Rules and Regulations) to read, "The Commission shall elect a Chairperson or two Co-Chairpersons from among its members at the first meeting of every year"; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

ARTICLE 21 BYLAW AMENDMENT/ARLINGTON COMMISSION ON ARTS AND CULTURE MEMBERSHIP

To see if the Town will vote to amend Title II, Article 8 of the Town Bylaws to increase the number of members of the Arlington Commission on Arts and Culture from seven to nine; or take any action related thereto.

(Inserted at the request of the Arlington Commission on Arts and Culture)

ARTICLE 25 BYLAW/DEMOLITION BY NEGLECT OF HISTORIC BUILDINGS

To see if the Town will vote to adopt a general bylaw to prevent the loss of historic buildings from neglect leading to irrevocable deterioration; or take any action related thereto.

(Inserted at the request of Carol Kowalski and ten registered voters)

ARTICLE 28**VOTE/AUTHORIZING COMMUNITY CHOICE
AGGREGATION**

To see if the Town will authorize the Board of Selectmen to commence a Community Choice Aggregation Program (CCA) and contract for electric supply as authorized by M.G.L. 164, Section 134, and through CCA decrease greenhouse gas emissions from the generation of electricity for Arlington residents and businesses by pursuing an increased amount of Class I designated renewable energy than is required by the Massachusetts Renewable Portfolio Standard (RPS); or to take any other action relative thereto.

(Inserted at the request of the Town Manager)




**Town of Arlington
Legal Department**

Douglas W. Heim
Town Counsel

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Website: www.arlingtonma.gov

To: Board of Selectmen

Cc: Adam Chapdelaine, Town Manager
John Leone, Town Moderator
Christine Bongiorno, Director of Health & Human Services
Proponents of Articles

From: Douglas W. Heim, Town Counsel 

Date: February 17, 2016

Re: Annual Town Meeting Warrant Articles ##18, 19, 20, 21, 25, 28

I write to provide the Board of Selectmen a summary of the above-referenced warrant articles to assist in the Board's consideration of these articles at its upcoming hearing on February 22, 2016. Please also find attached reference materials in the form of excerpts of relevant Town Bylaws, General Laws, and an advisory from the Massachusetts Commission Against Discrimination ("MCAD").

ARTICLE 18

BYLAW AMENDMENT/EXPANDING EQUAL PROTECTION

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws to promote equality by amending the Arlington Human Rights Commission's stated purpose to include additional and more comprehensive protected classes of persons and further to authorize the Commission to take action within the scope of its powers defined therein to protect and promote equality for such additional and more comprehensive protected classes of persons; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

This article was inserted at the request of the Arlington Human Rights Commission ("AHRC") to expand the list of protected classes set forth in Title II, Article 9 of the Town Bylaws to include persons with non-conforming gender identities, including transgender persons. This proposal follows a May 21, 2015 resolution of the AHRC to support presently pending legislation to bolster protections regarding gender identity and expression, commit to do what it can under its currently bylaw mandates, and pursue the present warrant article to explicitly amend their duties to include gender identity and expression within AHRC's list of protected classes. While I expect the AHRC will present information supporting their article, I note that the proposed amendment brings Arlington's bylaws largely in sync with 2012 reforms to Massachusetts' anti-discrimination statute, G.L. c. 151B, which was amended to include "gender identify" in its list of protected classes of persons. (See attached MCAD Advisory provided as reference material).

It is further worth the Board's consideration that federal law per the Equal Employment Opportunity Commission ("EEOC") and a number of Massachusetts municipalities including Boston and Cambridge have similarly determined gender identity to be an essential class of persons to be afforded full protection of anti-discrimination laws. A vote to update Arlington's bylaws in sufficient fashion would read as follows:

VOTED, that Title II, Article 9, Sections 2 and 5 be and are hereby amended by striking the word "gender" and replacing it with "sex, gender identity or expression" in relevant parts so as to read as follows:

ARTICLE 9: HUMAN RIGHTS COMMISSION
ART. 22, A.T.M., 5/12/93

Section 2. Policy of the Town of Arlington

- C. *It is the intention of this Bylaw that all persons be treated fairly and equally. The purpose of this Bylaw is to bring about the elimination of prejudice, intolerance, bigotry, unlawful discrimination, threats, coercion or intimidation based upon an individual's race, color, religious views, national origin, ~~gender sex~~, **gender identity or expression**, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status, and the disorder occasioned thereby. Nothing in this Bylaw shall be construed as supporting or advocating any particular religious or political view or lifestyle.*
- D. *It shall be considered an unlawful practice under this Bylaw for any person to deny, interfere with, threaten or subject an individual to coercion or intimidation concerning equal access to and/or discrimination in employment, housing, education, recreation, services, public accommodation and public area where such denial, interference, threats, coercion, intimidation or unlawful discrimination against a person is based upon race, color, religious views, national origin, ~~gender sex~~, **gender identity or expression**, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status.*

Section 5. Functions, Powers & Duties of the Commission

- A. *To initiate activities designed to educate and inform the Town about the effects of prejudice, intolerance, and bigotry through the following actions:*
 - 1. *To hold public hearings and public forums, make studies and surveys and to issue such publications and such results of investigations and research as, in its judgment, will tend to promote good will and minimize or eliminate discrimination because of race, color, religious views, national origin, ~~gender sex~~, **gender identity or expression**, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status.*

ARTICLE 19

BYLAW AMENDMENT/ARLINGTON HUMAN RIGHTS COMMISSION EXECUTIVE DIRECTOR

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws to modify and clarify the position of Executive Director to the Commission, including the conditions and process of appointment; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

This article was inserted at the request of the AHRC in furtherance of a promise to examine the appropriateness of an AHRC "Executive Director" as a requirement of the AHRC's bylaw from the 2015 Town Meeting. It is my understanding that a representative of the AHRC shall present further information detailing their examination of the issue, but that their conclusions are as follows:

- The Executive Director position should be discretionary rather than mandatory; and
- The process for the appointment of an Executive Director when necessary, should be streamlined to be an appointment by the Town Manager with the consultation of the AHRC, rather than be an appointment of the Town Manager which considers the AHRC's recommendation and obtains approval of the Board of Selectmen.

I note that the AHRC may also be seeking to have the Executive Director report directly to the AHRC, rather than the Town Manager. While an Executive Director may serve the AHRC in much the same way other boards and commissions work with full-time Town employees, per Sec. 15 of the Town Manager Act, the Town Manager is the supervisor of all Town personnel not explicitly excluded under the Act. As such, should the Board move for favorable action on the AHRC's proposal, I suggest the following as a template for a vote, which maintains that any Executive Director would report to the Town Manager as the current Bylaw states:

VOTED, that Title II, Article 9, Sections 3 be and is hereby amended by striking the word "shall" and replacing it with "may" in the second paragraph of subsection B.1 and adding the words "with consultation by the Commission" at the end of the second paragraph of same; and further striking the first full sentence of subsection D so as to read in relevant parts as follows:

ARTICLE 9: HUMAN RIGHTS COMMISSION

ART. 22, A.T.M., 5/12/93

B. Appointment & Terms of Office of Commission Members

1. *The Commission shall consist of thirteen (13) members, five of whom will be appointed by the school committee, four by the Town Manager subject to the approval of the Board of Selectmen and four by the Town Moderator. The term of office shall be for three years except two of the initial appointments of the school committee shall be for a term of one year, one of the initial appointments of the Manager and Moderator respectively shall be for one year, two of the initial appointments of the School Committee shall be for two years, one of the appointments of the Manager and Moderator respectively shall be for two years.*

The members shall be sworn to the faithful performance of their duties, and shall serve until their successors are appointed and sworn. There ~~shall~~ may be an Executive Director if determined necessary by the Commission, whom shall be appointed by the Town Manager with consultation by the Commission.

- D. *Executive Director. ~~Before appointing an Executive Director, the Town Manager shall obtain the approval of the Board of Selectmen and consider the recommendation of the Commission.~~ The Executive Director shall be an employee of the Town and report to the Town Manager. The prospective Executive Director shall have demonstrable experience in human and civil rights, as well as proven ability to work cooperatively in a diverse community.*

ARTICLE 20

BYLAW AMENDMENT/ARLINGTON HUMAN RIGHTS COMMISSION CHAIRPERSONS

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws (Section 3.E.1 Executive Director, Officers, Quorum and Adoption of Rules and Regulations) to read, "The Commission shall elect a Chairperson or two Co-Chairpersons from among its members at the first meeting of every year"; or take any action related thereto.

(Inserted at the request of the Arlington Human Rights Commission)

This article was also inserted at the request of the AHRC to amend their bylaws to allow for the creation of co-chair positions rather than the current bylaw requirement of a single chairperson. While the proposal is straightforward, I expect a representative of the AHRC to present further details at the Board's hearing.

Should the Board decide to support this article, a motion would read as follows:

VOTED, that Title II, Article 9, Section 3.E.1 be and is hereby amended by adding the words "or two Co-Chairpersons" to the first sentence of the first paragraph and "Co-Chairpersons" to the second paragraph so to read as follows:

E. Officers, Quorum, and Adoption of Rules and Regulations

- 1. The Commission shall elect a Chairperson or two Co-Chairpersons from among its members at the first meeting each year. The Commission shall endeavor to rotate the election of a Chairperson each year thereafter.*

The Chairperson or Co-Chairpersons shall preside over the meetings of the Commission.

**ARTICLE 21 BYLAW AMENDMENT/ARLINGTON COMMISSION ON ARTS
AND CULTURE MEMBERSHIP**

To see if the Town will vote to amend Title II, Article 8 of the Town Bylaws to increase the number of members of the Arlington Commission on Arts and Culture from seven to nine; or take any action related thereto.

(Inserted at the request of the Arlington Commission on Arts and Culture)

By vote on January 7, 2016, the Arlington Commission on Arts and Culture ("ACAC") sought this article to expand their membership as set forth in Title II, Article 8, Section 1 of the Town Bylaws. I expect ACAC will provide further details at hearing on the rationale for adding two additional members to the Commission, as well as the appointing authority or authorities for such new members.

**ARTICLE 25 BYLAW/DEMOLITION BY NEGLECT OF HISTORIC
BUILDINGS**

To see if the Town will vote to adopt a general bylaw to prevent the loss of historic buildings from neglect leading to irrevocable deterioration; or take any action related thereto.

(Inserted at the request of Carol Kowalski and ten registered voters)

This article comes via resident petition and my understanding is that its proponent will present further details at hearing. However, it should be noted that several communities in Massachusetts, including the Town of Lexington have formulated bylaws to prevent property owners from circumventing local historic preservation regulations by allowing their properties to fall into neglect and essentially become blighted properties. I anticipate that a draft motion would define "historic buildings" as those on the inventory of historically significant properties, and therefore include properties under the jurisdiction of either the Arlington Historic Districts Commission or the Historical Commission.

ARTICLE 28

VOTE/AUTHORIZING COMMUNITY CHOICE AGGREGATION

To see if the Town will authorize the Board of Selectmen to commence a Community Choice Aggregation Program (CCA) and contract for electric supply as authorized by M.G.L. 164, Section 134, and through CCA decrease greenhouse gas emissions from the generation of electricity for Arlington residents and businesses by pursuing an increased amount of Class I designated renewable energy than is required by the Massachusetts Renewable Portfolio Standard (RPS); or to take any other action relative thereto.

(Inserted at the request of the Town Manager)

Article 28 seeks Town Meeting's authorization to enter into a Community Choice Electrical Aggregation (CCA) agreement with a broker (the "aggregator") on behalf of the Town of Arlington to provide electricity services for Town residents and business owners. In short, a CCA offers Town residents the option of continuing to use Eversource as their electricity supplier (or their current alternative energy supplier) or the Town-selected provider. In this instance, the Town specifically contemplates utilizing a Metropolitan Area Planning Council ("MAPC") procurement to contract with Good Energy, a national energy consulting firm, with simultaneous purposes of providing competitive electricity rates and increasing the share of Arlington electricity derived from renewable energy sources.

By way of background, the Commonwealth enacted c. 164 in 1997 as a means of increasing competition in the utility industry. At this juncture, over seventeen (17) Massachusetts municipalities have both authorized CCA and developed plans approved by the Department of Public Utilities (DPU), with dozens more communities, including Brookline and Burlington recently authorizing CCA and working on their plans. Further, over time the goals of CCA competition have expanded to encompass not only include competitive price and stability considerations, but social considerations as well such as reducing greenhouse gas and pollutant emissions by entering CCA agreements with brokers and companies with attractive renewable energy portfolios. While markets are subject to change, it is the Town's expectation that the anticipated CCA agreement would simultaneously pursue lower priced and greener electricity.

It must be stressed that if CCA is adopted and implemented, individual residents and businesses would both be permitted to opt-out of the aggregation without penalty before aggregation takes effect, regardless of whether they elect to use Eversource or another

competitive supplier. Furthermore, while the MAPC procurement will streamline the process for Arlington, Town Meeting approval is only the first step in aggregation. As noted above, the Town's CCA agreement must be approved by DPU following at least one additional public hearing to vet the agreement. Town departments, officials, residents and other stakeholders will have ample opportunity to ensure the end CCA service is suitable for Arlington before electricity consumers have to make any choices. While there are modest variations, the complete process is generally as follows:

1. Vote to Authorize CCA at Town Meeting.
2. Issue a Request for Proposals for an Aggregator.¹
3. Develop a CCA Plan with Aggregator in Consultation with the Department of Energy Resources.
4. Review of the CCA Plan by Town Manager, Board of Selectmen and Consumers.
5. Vote on the CCA Plan by Board of Selectmen for submittal to DPU.
6. Submit the Plan for DPU Approval
7. DPU conducts a Hearing
8. Issue the RFP for Competitive Suppliers
9. Selection of Competitive Supplier by Town Manager
10. Notification of Enrollment for Eligible Consumers.
11. Opt-Out Period (30 days prior to first service date).
12. Transfer of Participating Consumers to the Selected Competitive Suppliers

Should the Board support putting CCA before Town Meeting, I respectfully recommend the following for positive action:

VOTED: Pursuant to M.G.L. c. 164 sec. 134, Town Meeting hereby authorizes the appropriate Town officials and departments to commence the process of developing a Community Choice Electrical Aggregation Program, and to research, develop and participate in a contract, or contracts to aggregate the electricity load of the residents and businesses in the Town of Arlington and for other related services, independently, or in joint action with other municipalities, and authorize the Town Manager to execute all documents necessary accomplish the same.

¹ Here, Arlington proposes to use the MAPC's RFP.

REFERENCE MATERIAL: RELEVANT TOWN BYLAWS

Excerpts from the Town Bylaws:

TITLE II COMMITTEES AND COMMISSIONS

Article 9. Human Rights Commission

ART. 22, A.T.M., 5/12/93.

Section 2. Policy of the Town of Arlington

- A. It is the intention of the Town of Arlington ("Town") to establish a Commission to advance issues related to the fair and equal treatment of individuals, and to create a mechanism for addressing complaints arising out of these issues.
- B. It is the policy of the Town to protect every individual in the enjoyment and exercise of his/her human and civil rights and to encourage and bring about mutual understanding and respect among all people within the Town.
- C. It is the intention of this Bylaw that all persons be treated fairly and equally. The purpose of this Bylaw is to bring about the elimination of prejudice, intolerance, bigotry, unlawful discrimination, threats, coercion or intimidation based upon an individual's race, color, religious views, national origin, gender, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status, and the disorder occasioned thereby. Nothing in this Bylaw shall be construed as supporting or advocating any particular religious or political view or lifestyle.
- D. It shall be considered an unlawful practice under this Bylaw for any person to deny, interfere with, threaten or subject an individual to coercion or intimidation concerning equal access to and/or discrimination in employment, housing,

education, recreation, services, public accommodation and public area where such denial, interference, threats, coercion, intimidation or unlawful discrimination against a person is based upon race, color, religious views, national origin, gender, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status.

Section 3. Establishment of a Human Rights Commission

B. Appointment & Terms of Office of Commission Members

1. The Commission shall consist of thirteen (13) members, five of whom will be appointed by the school committee, four by the Town Manager subject to the approval of the Board of Selectmen and four by the Town Moderator. The term of office shall be for three years except two of the initial appointments of the school committee shall be for a term of one year, one of the initial appointments of the Manager and Moderator respectively shall be for one year, two of the initial appointments of the School Committee shall be for two years, one of the appointments of the Manager and Moderator respectively shall be for two years.

The members shall be sworn to the faithful performance of their duties, and shall serve until their successors are appointed and sworn. There shall be and Executive Director appointed by the Town Manager.

- D. Executive Director Before appointing an Executive Director, the Town Manager shall obtain the approval of the Board of Selectmen and consider the recommendation of the Commission. The Executive Director shall be an employee of the Town and report to the Town Manager. The prospective Executive Director shall have demonstrable experience in human and civil rights, as well as proven ability to work cooperatively in a diverse community.

Subject to the direction of the Commission, the Executive Director shall be responsible for the overall administration of the Commission's activities and shall serve as its executive officer. The Executive Director shall have the power and duty to initiate activities designed to educate and inform the Town about the effects of prejudice, intolerance, and bigotry; to receive and/or initiate complaints and investigations of discriminatory practices as defined by local, state, and federal law; to report his/her findings to the Commission; and to attempt mediation of any complaint alleging discrimination under applicable local, state, and federal law when there is cause for such complaint.

E. Officers, Quorum, and Adoption of Rules and Regulations

1. The Commission shall elect a Chairperson from among its members at the first meeting each year. The Commission shall endeavor to rotate the election of a Chairperson each year thereafter.

Section 5. Functions, Powers & Duties of the Commission

The function of the Commission shall be to implement the policy of this Bylaw by the exercise of the following powers and duties:

- A. To initiate activities designed to educate and inform the Town about the effects of prejudice, intolerance, and bigotry through the following actions:
 1. To hold public hearings and public forums, make studies and surveys and to issue such publications and such results of investigations and research as, in its judgment, will tend to promote good will and minimize or eliminate discrimination because of race, color, religious views, national origin, gender, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status.

TITLE II COMMITTEES AND COMMISSIONS

Article 8. Arlington Commission on Arts and Culture

(ART. 21, ATM – 05/17/93), (ART. 15, ATM – 04/30/14)

Section 1. Establishment of Arlington Commission on Arts and Culture

There is hereby established an Arlington Commission on Arts and Culture, which shall consist of seven members all of whom shall be residents of the Town.

Six members, one of whom shall be a member of the Vision 2020 Culture and Recreation Task Group, shall be appointed by the Town Manager subject to the approval of the Board of Selectmen and one member shall be appointed by the School Committee. The respective appointing authorities shall consider for appointment, but need not appoint, persons recommended by the Vision 2020 Culture and Recreation Task Group for their initial appointments and, thereafter, persons recommended by the Commission. Two of the initial appointments by the town Manager shall be for a three year term, two for a two year term and two for a one year term. The initial appointment by the School Committee shall be for a three year term. After the initial appointment each term shall be for three years. Each member shall serve until their successors are appointed and sworn. Unexpired terms shall be filled in the same manner as the initial appointment. The Commission shall organize for the conduct of its affairs and shall elect its own officers. Members may be removed by the appointing authority upon request of a majority of the Commission for three or more unexcused absences from Commission meetings in any calendar year.

REFERENCE MATERIAL FROM THE GENERAL LAWS

LOAD AGGREGATION PROGRAM

M.G.L. c. 164 § 134(a)

Section 134 (a) Any municipality or any group of municipalities acting together within the commonwealth is hereby authorized to aggregate the electrical load of interested electricity consumers within its boundaries; provided, however, that such municipality or group of municipalities shall not aggregate electrical load if such are served by an existing municipal lighting plant. Such municipality or group of municipalities may group retail electricity customers to solicit bids, broker, and contract for electric power and energy services for such customers. Such municipality or group of municipalities may enter into agreements for services to facilitate the sale and purchase of electric energy and other related services. Such service agreements may be entered into by a single city, town, county, or by a group of cities, towns, or counties.

A municipality or group of municipalities which aggregates its electrical load and operates pursuant to the provisions of this section shall not be considered a utility engaging in the wholesale purchase and resale of electric power. Providing electric power or energy services to aggregated customers within a municipality or group of municipalities shall not be considered a wholesale utility transaction. The provision of aggregated electric power and energy services as authorized by this section shall be regulated by any applicable laws or regulations which govern aggregated electric power and energy services in competitive markets.

A town may initiate a process to aggregate electrical load upon authorization by a majority vote of town meeting or town council. A city may initiate a process to authorize aggregation by a majority vote of the city council, with the approval of the mayor, or the city manager in a Plan D or Plan E city. Two or more municipalities may as a group initiate a process jointly to authorize aggregation by a majority vote of each particular municipality as herein required.

Upon an affirmative vote to initiate said process, a municipality or group of municipalities establishing load aggregation pursuant to this section shall, in consultation with the department of energy resources, pursuant to section 6 of chapter 25A, develop a plan, for review by its citizens, detailing the process and consequences of aggregation. Any municipal load aggregation plan established pursuant to this section shall provide for universal access, reliability, and equitable treatment of all classes of customers and shall meet any requirements established by law or the department concerning aggregated service. Said plan shall be filed with the department, for its final review and approval, and shall include, without limitation, an organizational structure of the program, its operations, and its funding; rate setting and other costs to participants; the methods for entering and terminating agreements with other entities; the rights and responsibilities of program participants; and termination of the program. Prior to its decision, the department shall conduct a public hearing.

Participation by any retail customer in a municipal or group aggregation program shall be voluntary. If such aggregated entity is not fully operational on the retail access date, any ratepayer to be automatically enrolled therein shall receive basic service unless affirmatively electing not to do so. Within 30 days of the date the aggregated entity is fully operational, such ratepayers shall be transferred to the aggregated entity according to an opt-out provision herein. Following adoption of aggregation through the votes specified above, such program shall allow any retail customer to opt-out and choose any supplier or provider such retail customer wishes. Once enrolled in the aggregated entity, any ratepayer choosing to opt-out within 180 days shall do so without penalty and shall be entitled to receive basic service as if he was originally enrolled therein. Nothing in this section shall be construed as authorizing any city or town or any municipal retail load aggregator to restrict the ability of retail electric customers to obtain or receive service from any authorized provider thereof.

It shall be the duty of the aggregated entity to fully inform participating ratepayers in advance of automatic enrollment that they are to be automatically enrolled and that they

have the right to opt-out of the aggregated entity without penalty. In addition, such disclosure shall prominently state all charges to be made and shall include full disclosure of the basic service rate, how to access it, and the fact that it is available to them without penalty. The department of energy resources shall furnish, without charge, to any citizen a list of all other supply options available to them in a meaningful format that shall enable comparison of price and product.

(b) A municipality or group of municipalities establishing a load aggregation program pursuant to subsection (a) may, by a vote of its town meeting or legislative body, whichever is applicable, adopt an energy plan which shall define the manner in which the municipality or municipalities may implement demand side management programs and renewable energy programs that are consistent with any state energy conservation goals developed pursuant to chapter 25A or chapter 164. After adoption of the energy plan by such town meeting or other legislative body, the city or town clerk shall submit the plan to the department to certify that it is consistent with any such state energy conservation goals. If the plan is certified by the department, the municipality or group of municipalities may apply to the Massachusetts clean energy technology center for monies from the Massachusetts Renewable Energy Trust Fund, established pursuant to section 9 of chapter 23J, and receive, and if approved, expend moneys from the demand side management system benefit charges or line charges in an amount not to exceed that contributed by retail customers within said municipality or group municipalities. This will not prevent said municipality or municipalities from applying to the Massachusetts clean energy technology center for additional funds. If the department determines that the energy plan is not consistent with any such state-wide goals, it shall inform the municipality or group of municipalities within six months by written notice the reasons why it is not consistent with any such state-wide goals. The municipality or group of municipalities may re-apply at anytime with an amended version of the energy plan.

The municipality or group of municipalities shall not be prohibited from proposing for certification an energy plan which is more specific, detailed, or comprehensive or which

covers additional subject areas than any such state-wide conservation goals. This subsection shall not prohibit a municipality or group of municipalities from considering, adopting, enforcing, or in any other way administering an energy plan which does not comply with any such state-wide conservation goals so long as it does not violate the laws of the commonwealth.

The municipality or group of municipalities shall, within two years of approval of its plan or such further time as the department may allow, provide written notice to the department that its plan is implemented. The department may revoke certification of the energy plan if the municipality or group of municipalities fails to substantially implement the plan or if it is determined by independent audit that the funds were misspent within the time allowed under this subsection.

REFERENCE MATERIAL: OTHER MATERIALS ATTACHED



MCAD ADVISORY: AN ACT RELATIVE TO GENDER IDENTITY

On July 1, 2012, Massachusetts General Laws Chapter 151B was amended to prohibit discrimination in employment, housing, lending, credit and mortgage services based on an individual's gender identity. The Massachusetts Commission Against Discrimination (MCAD) enforces G.L. c. 151B and has developed this advisory to educate the public about discrimination based on gender identity, to inform individuals of their rights, and to assist employers, providers of housing and mortgage services and other entities in understanding their obligations under the law.

I. Introduction

Since 2001, the MCAD has held that discrimination against transgender individuals could constitute sex and disability discrimination. In Millett v. Lutco, 23 Mass. Discrimination Law Rptr. 231 (2001), the MCAD's Commissioners, acting as the Full Commission, issued an Order stating that discrimination against a transgender individual constituted illegal sex discrimination. In Jette v. Honey Farms Mini Market, 23 Mass. Discrimination Law Rptr. 229 (2001), the Full Commission, issued another Order reasoning that transgender individuals with an underlying diagnosis of gender dysphoria may have a claim for disability discrimination under G.L. c. 151B. The Full Commission further recognized that an employer may be liable for discrimination based on sexual orientation if it perceives a transgendered individual to be homosexual, and discriminates based on that belief. Millett v. Lutco, *supra*. Pursuant to these decisions, the Commission has routinely investigated and issued findings in discrimination cases filed by transgender individuals under the Fair Employment Practices Act, G.L. c. 151B and the Massachusetts Public Accommodation Act, G.L. c. 272. For more information, see section IV.

On the federal side, the U.S. Equal Employment Opportunity Commission (EEOC) has taken steps to ensure that the rights of LGBT individuals are protected under Title VII—the federal law which prohibits employment discrimination. In 2012, the EEOC ruled that discrimination against a transgender individual, based on transgender identity specifically and gender identity generally, is prohibited under Title VII's sex discrimination provision.¹ In April 2015, the EEOC ruled that restricting a transgender employee from using a restroom facility consistent with the employee's gender identity and refusing to use the transgender employee's preferred name and gender pronoun constituted sex discrimination and sex-based harassment under Title VII.²

II. The Law's coverage

This new law amended G.L. c. 151B to include gender identity as a protected class in employment, housing, credit and mortgage services. In addition to prohibiting discrimination based on gender identity, the new law expanded the definition of a hate crime to include criminal acts motivated by prejudice towards transgender individuals and prohibited discrimination based on gender identity in public schools. G.L. c. 22C, § 32 (hate crimes); G.L. c. 71, § 89 (public schools); G.L. c. 76, §§ 5, 12B (public schools). These latter provisions of the Act are not enforced by the MCAD.³ The areas in which gender identity discrimination is enforced by the MCAD are described below.

¹ Macy v. Dep't of Justice, EEOC Appeal No. 0120120821 (April 20, 2012).

² Lusardi v. McHough, EEOC Appeal No. 0120133395 (April 1, 2015).

³ In certain circumstances, the victim of a hate crime may bring an action at the MCAD. For example, if an employee is the victim of a gender-identity based hate crime perpetrated by his/her supervisor in the context of employment, this could constitute discrimination and/or harassment.

A. Employment

It is an unlawful discriminatory practice for an employer,⁴ or an employee or agent thereof, to discriminate against any employee or applicant for employment based upon that individual's gender identity with regard to recruitment, hiring, firing, discipline, promotion, wages, job assignments, training, benefits, and other terms and conditions of employment. Discrimination may take the form of unwelcome verbal or physical conduct, including but not limited to, derogatory comments, jokes, drawings or photographs, touching or gestures. Examples of discrimination in employment include the following:

- An employee takes a leave of absence to undergo transition from male to female, and upon her return from leave, her employer reduces her hours, downsizes her office, and demotes her.
- A male job applicant is rejected solely because the employer learns, after checking his employment references, that the applicant identified as a woman in previous employment.
- A male employee is constantly harassed or made fun of by his supervisors for mannerisms perceived to be feminine.
- A transgender employee is consistently excluded from office meetings, office parties, and work-related events to which all other employees are invited.
- A transgender employee notifies his employer that his co-workers persistently mock and deride him because of his gender-identity, and the employer fails to take prompt remedial action to stop the harassment.

In evaluating a claim of hostile work environment based on gender identity, the Commission considers the employer's evidence of its support for the employee. In a case where the company president met with all staff, communicated that the employer would not tolerate discrimination or harassment of a transgender employee and directed that the employee be treated with respect; disciplined an employee who sought not to interact with the transgender employee; changed company records to reflect the employee's name change; provided a leave of absence for surgeries; assisted the transgender employee in obtaining insurance coverage for the surgeries; arranged for the employee's use of a private bathroom prior to the completion of her sexual reassignment surgery and welcomed the employee's use of the women's restroom following gender reassignment surgery, the Commission found the Complainant was not subjected to a hostile work environment. *Millett and MCAD v. Lutco, Inc.*, 30 Mass. Discrimination Law Rptr. 77, 85 (2008) (holding that "matters that might be egregious in isolation appear less so in the context of the supportive actions which the Company took on Complainant's behalf"). The Commission has set forth a list of best practices as guidance for employers in Section IV.

B. Housing

With the exception of certain categorical statutory exclusions, G.L. c. 151B makes it an unlawful discriminatory practice for an owner, lessor, managing agent or other person having the right to sell, rent or lease or approve the sale, rental or lease of housing, to refuse to sell, rent, lease, approve the sale, rental or lease, or otherwise deny or withhold housing, or an interest therein, or otherwise discriminate against any person because of his or her gender identity. In addition, real estate brokers, real estate salespersons, and employees or agents thereof, may not discriminate on the basis of gender identity. Prohibited behavior includes all aspects of real property transactions, such as the refusal to show, rent or sell real property that is

⁴An employer is generally defined under G.L. c. 151B as one that employs six or more persons. Public employers are included regardless of the number of people employed.

available for sale or lease, and the refusal to provide services or make repairs or improvements for any tenant or lessee based on gender identity.⁵ Examples of discrimination in housing include the following:

- A landlord, whose apartment does not fall within any of the statutory exclusions in G.L. c. 151B, refuses to show a transgender male an apartment for rent for reasons related to the prospective tenant's gender identity.
- A landlord adversely changes the terms and conditions of a transgender tenant undergoing gender reassignment therapy, resulting in the tenant's eviction.
- A realtor steers a transgender individual away from an apartment because he does not feel that the individual would "be a good fit for the neighborhood."
- The owner of a commercial property refuses to lease the property to a transgender rights group because of prejudice toward transgender individuals.

C. Credit and mortgage services

Banks or other lending institutions may not discriminate against an applicant for credit on the basis of gender identity. Examples of discrimination in lending and credit include the following:

- A mortgage broker steers a transgender borrower, who is eligible for prime loans, into a sub-prime loan with high monthly payments and interest rate and excessive prepayment penalties.
- A credit card company refuses to issue a credit card to a transgender male because he previously identified as a female.

D. Retaliation

It is unlawful to retaliate against an individual who has opposed a discriminatory practice or filed a charge of discrimination, or who has testified, assisted or participated in a Commission investigation, proceeding or hearing. It is also unlawful for an employer to issue a negative reference about an employee in retaliation for that employee's protected activity, such as formally or informally charging the employer with discrimination.

III. Definitions and Proof

A. Definition of Gender Identity

G.L. c. 151B defines "gender identity" as "a person's gender-related identity, appearance or behavior, whether or not that gender-related identity, appearance or behavior is different from that traditionally associated with the person's physiology or assigned sex at birth." Gender identity is an individual's sense of being male or female.⁶ The way an individual expresses his or her gender identity is frequently called "gender expression," and may or may not conform to social stereotypes associated with a particular gender.⁷

⁵ The U.S. Department of Housing and Urban Development regulations explicitly require that eligibility determinations for HUD-assisted or insured housing must be made without regard to actual or perceived gender identity. They also preclude owners and operators of HUD-assisted housing or housing with financing insured by HUD from inquiring about the sexual orientation or gender identity of an applicant for, or occupant of, a dwelling. See, Final Rule issued February 3, 2012; (codified at 24 C.F.R. pts. 5, 200, 203, 236, 400, 570, 574, 882, 891, and 982).

⁶ U.S. Office of Personnel Management: Guidance Regarding the Employment of Transgender Individuals in the Federal Workplace, <http://www.opm.gov/diversity/Transgender/Guidance.asp>.

⁷ Id.

The law protects individuals who are transgender. Transgender individuals are people whose gender identity is different from the sex assigned to them at birth.⁸ Transition is the process by which a transgender person goes from presenting as one gender to another.⁹ For some, the process of transition may be lengthy. Some transgender individuals seek medical treatment such as counseling, hormone therapy, electrolysis, and reassignment surgery. Some may not pursue medical treatment or gender reassignment surgery. The statutory definition of gender identity does not require the individual to have undergone transitional surgery or intend to undergo surgery, nor does it require evidence of past medical care or treatment. Gender identity is distinguished from sexual orientation.¹⁰ Sexual orientation is based on the direction of one's physical and romantic attractions, which may be identified as heterosexual, homosexual, lesbian or bi-sexual. Gender identity refers to a person's internal sense of their own gender its expression.

The law also protects persons whose gender identity is consistent with their assigned sex at birth, but who do not adopt or express traditional gender roles, stereotypes or cultural norms. Prior to the Act, courts and the MCAD issued decisions concluding that gender stereotypes may be the source of unlawful bias.¹¹ For example, discrimination against a person designated as female at birth and whose identity is female but who does not act, dress, or groom herself in a manner consistent with feminine stereotypes, is unlawful discrimination based on sex and gender identity.

B. Proof Requirements

A person may establish gender-related identity through medical history, medical/psychiatric care or treatment of the gender-related identity; by consistent and uniform assertion of the gender-related identity or by any other evidence that one's gender-related identity is sincerely held as part of one's core identity; provided, however, that gender-related identity shall not be asserted for any improper purpose, see *infra* Section III C. Examples of the type of evidence which will assist the Commission in investigating claims of gender-identity discrimination are:

- Sworn statements by a Complainant and/or witnesses relating to the Complainant's sincerely held core gender-related identity;
- Sworn statements from the Complainant and/or witnesses relating to the Complainant's routine activities and conduct, such as dress, grooming, actions and use of gendered pronouns;
- Sworn statements and/or medical records from medical and/or mental health professionals involved in the treatment/ transition of individuals seeking, in the process of, or who have completed gender reassignment;
- Evidence of hormone use, sex reassignment surgeries, and/or other procedures that alter appearance;

⁸ *Id.* An individual who was assigned the male sex at birth but who identifies as female is a transgender woman. Likewise, a person assigned the female sex at birth but who identifies as male is a transgender male.

⁹ *Id.*

¹⁰ *Lie v. Sky Publishing Corp.*, 2002 WL 31492397 (Mass. Super. Ct. 2002).

¹¹ *Price Waterhouse v. Hopkins*, 490 U.S. 228 (1989) (gender-based remarks reflecting view that female manager was not sufficiently feminine are evidence of gender discrimination); *Higgins v. New Balance Athletic Shoe, Inc.*, 194 F.3d 252, 259 (1st Cir. 1999) (Court stated, in dicta, that just as a female may claim gender discrimination for being viewed as failing to meet stereotypical expectations of femininity, a male may base a claim of gender discrimination on evidence that he was viewed as not conforming to stereotypical expectations of masculinity); *Centola v. Potter*, 183 F. Supp. 2d 403 (D. Mass. 2002) (an employer who makes employment decisions based on stereotypes about sexual roles or allows the creation of a hostile or abusive work environment based on sexual stereotypes, may be liable under Title VII's prohibition of discrimination on the basis of sex); *Ianetta v. Putnam Investments, Inc.*, 142 F. Supp. 2d 131 (D. Mass. 2002) (discrimination against a male for failing to conform to gender stereotypes); *Connor v. Hub Folding Box Co.*, 15 Mass. Discrimination Law Rptr. 1494 (1993), *aff'd*, *Hub Folding Box Co., Inc. v. Mass. Comm'n Against Discrimination*, 52 Mass. App. Ct. 1104 (Rule 1:28 decision, July 12, 2001) (gender stereotype that a woman with a tattoo was a prostitute, on drugs, or from a "broken home" reflects gender bias).

- Evidence of a legal name change, revision of birth certificate, passport, or social security card, re-designation of gender on a Massachusetts Department of Transportation Registry of Motor Vehicles form, or other legal documents reflecting gender identity.

C. Meaning of "Sincerely Held and Part of a Person's Core Identity"/Improper Purpose

The courts have yet to give significant guidance on how to interpret the requirement that gender identity be "sincerely held and part of a person's core identity." The considerations bearing on this requirement will necessarily be developed as the case law evolves; however, evidence of consistent conduct over a period of time is likely to support a claim of sincerely held core gender identity.

The law excludes from its coverage a gender-related identity that is "asserted for any improper purpose," which would include an unlawful purpose. For instance, a fraudulent representation to obtain an otherwise unavailable employment-related benefit or a fraudulent effort to evade a legal obligation or an effort to commit a crime would constitute improper unlawful purposes.

D. Restrooms and Sex-Segregated Facilities

No provision of G.L. c. 151B prohibits restrooms from being designated by gender. Prohibiting an individual from using a restroom or other sex-segregated facility consistent with his/her gender identity may be evidence of discriminatory animus. Requiring an employee to provide identification or proof of any particular medical procedure (including gender reassignment surgery) in order to access gender designated facilities, may also evidence discriminatory bias.

IV. Transgender Protection under the Massachusetts Public Accommodation Act and the Massachusetts Fair Educational Practices Law

While the Act did not explicitly amend the Public Accommodations Act, G.L. c. 272, § 98 and the Fair Educational Practices Act, G.L. c. 151C, MCAD investigates and adjudicates claims brought pursuant to these statutes, where there is evidence of discrimination based on gender, disability and/or perceived sexual orientation. As described in Section I, the Commission has held that discrimination against transgender individuals may be prohibited under the proscriptions against gender and disability discrimination. *Millett v. Lutco*, supra.; *Jette v. Honey Farms Mini Market*, supra. (gender dysphoria can constitute a disability). The facts of a particular case may also support a claim of discrimination based on sexual orientation. *Id*.

Examples of discrimination in a place of public accommodation are:

- A restaurant refuses to seat a group of transgender patrons on the grounds that "this is a quiet restaurant," and "you will draw too much attention from our other patrons."
- A hotel refuses to host a conference of transgender individuals.

Examples of discrimination in an educational institution are:

- A graduate school refuses to admit a male transgender applicant when it learns from the applicant's educational records that he previously identified as a female.¹²
- A graduate school refuses to allow a transgender female graduate student to serve as a resident assistant in a female dormitory because she previously identified as a male.

¹² The Fair Educational Practices Act prohibits discrimination against any person seeking admission to a vocational training institution or to a program or course of study leading to a degree, beyond a bachelor's degree, because of sex or to discriminate against any student admitted to a vocational training institution in providing benefits, privileges, and placement services.

V. Best Practices

The Commission encourages employers, housing providers, and entities subject to the law to foster an inclusive and welcoming environment by following best practices recommended by the American Bar Association¹³ which may include the following:

- Revise non-discrimination, equal opportunity, non-harassment, and other employment-related policies to include a statement that discrimination and harassment on the basis of gender identity is prohibited;
- Update personnel records, payroll records, email systems, and other documents to reflect employee's stated name and gender identity, and ensure confidentiality of any prior documentation of an employee's pre-transition name or gender marker;
- Prohibit derogatory comments or jokes about transgender persons from employees, clients, vendors and any others, and promptly investigate and discipline persons who engage in discriminatory conduct;
- Use names, pronouns, and gender-related terms appropriate to employee's stated gender identity in communications with employee and with others;
- Avoid gender-specific dress codes and permit employees to dress in a manner consistent with their gender identity;
- Provide employees access to any sex-segregated facility, i.e. bathrooms, locker room facilities, based on the employee's stated gender identity;
- Incorporate in any diversity, anti-discrimination, and anti-harassment trainings information about transgender employees, whether or not there are currently transgender employees, or employees who have self-identified as transgender, at the workplace;
- Employers should investigate and take appropriate remedial action when on notice of harassing or discriminatory conduct in the workplace;
- Landlords or property owners should take appropriate remedial action to ensure cessation of harassment by other tenants based on gender identity.

¹³ American Bar Association's Commission on Sexual Orientation and Gender Identity, "Best Practices for Promotion LGBT Diversity" published 2011.

W.A. #18 Comments AHRC M. Goldsipe:



BYLAW AMENDMENT/EXPANDING EQUAL PROTECTION

To see if the Town will vote to amend Title II, Article 9 of the Town Bylaws to promote equality by amending the Arlington Human Rights Commission's stated purpose to include additional and more comprehensive protected classes of persons and further to authorize the Commission to take action within the scope of its powers defined therein to protect and promote equality for such additional and more comprehensive protected classes of persons; or take any action related thereto.

AHRC recommends adding "gender identity and expression" to the list of protected classes.

Current protected classes in Arlington's Bylaws (list appears in more than one place in the Bylaws):

Title II, Article 9, Section 2. Policy of the Town of Arlington

D. It shall be considered an unlawful practice under this Bylaw for any person to deny, interfere with, threaten or subject an individual to coercion or intimidation concerning equal access to and/or discrimination in employment, housing, education, recreation, services, public accommodation and public area where such denial, interference, threats, coercion, intimidation or unlawful discrimination against a person is based upon **race, color, religious views, national origin, gender, citizenship, age, ancestry, family/marital status, sexual orientation, disability, source of income, or military status.**

2011's "Act Relative to Gender Identity" in Massachusetts added "gender identity"* to some but not all nondiscrimination protections. The most important part missing is protections in places of public accommodation,* including medical offices, public transportation, restaurants, hotels, libraries, nursing homes, public parks, and more. "An Act Relative to Transgender Anti-Discrimination" would provide these protections statewide regarding gender identity and expression, but it's not clear if it will pass—or even come to a vote—this session. **Cities and towns like Arlington are passing local ordinances like the one AHRC is proposing here to fill the gap in protections.** Our time is now.

Even when the state law finally passes, it will still be important for Arlington's bylaws to reflect our town's values. That is what the current wording of Arlington's bylaw does. It makes explicit the town's commitment to diversity and provides protections to the groups most often victims of discrimination and violence. **Arlington's bylaws already declare us to be a welcoming town to most at-risk groups. This is an important way to show our continued commitment to equality and diversity.**

It is important for Arlington to join other welcoming communities in this state and make a clear statement that transgender and gender non-conforming individuals who want to live, work, visit, shop, or receive services in Arlington are *welcome* and *protected* here. All of us function best when living without fear of violence, discrimination, exclusion, and humiliation. Violence and discrimination against anyone hurts all our children, our families, our businesses, and our community as a whole.

When communities are welcoming places for everyone to live, work, and raise families, businesses succeed too. In fact, businesses like Harvard Pilgrim, Google, and Eastern Bank are on the leading edge of efforts to secure protections for LGBT people. Nearly 70% of US Fortune 500 companies have nondiscrimination policies covering gender identity, according to HRC's Corporate Equality Index.

* See definition on reverse side.

Definitions

Gender identity is gender-related identity, appearance, or behavior that is part of a person's core self.

The *transgender* community includes people who transition from one gender to another and/or defy social expectations of how they should look, act, or identify based on the sex assigned to them at birth.

Gender expression refers to the cues people use to signify gender. This can include clothing, mannerisms, makeup, behavior, speech patterns, and more.

Those who are *gender non-conforming* do not fit traditional stereotypes about how men or women should look or act.

Public accommodations are any places we go between home and school or work.

Facts

Nondiscrimination laws protecting gender identity have passed across the nation in 17 states, D.C., and over 200 cities and towns—12 so far in Massachusetts, including Boston, Cambridge, Lynn, Medford, and Salem. It's time for Arlington to join them on the right side of history.

Those opposed to the state equal access bill use scare tactics to deny rights to the transgender and gender non-conforming community, a group far more likely to be *victims* of harassment and violence. Cities and towns with equal access protections in public spaces have reported positive impact to the trans community and no negative impact on the wider community. These protections *increase safety* by setting community standards for treating everyone fairly with dignity and respect.

Project Voice's survey of the trans and gender non-conforming community in Massachusetts found:

- 65% of transgender people reported experiencing discrimination in an area of public accommodation.
- The five most prevalent public accommodations discrimination settings were: transportation (36%), retail (28%), dining (26%), public gathering location (25%), and health care (24%).
- Those who reported visual gender non-conformity were much more likely to report experiencing public accommodations discrimination in the past 12 months.
- Those who reported public accommodations discrimination in the past 12 months had an 84% increased risk of adverse physical symptoms (such as headache, upset stomach, tensing of muscles, or pounding heart) in the past 30 days and 99% increased risk of emotional symptoms (including feeling emotionally upset, sad, or frustrated) in the past 30 days.
- 20% postponed or did not try to get health care in the past year because of prior experiences of mistreatment in health care settings

Resources

I AM: Trans People Speak video project, transpeoplespeak.org

Freedom Massachusetts, "Background on Public Accommodations," freedommassachusetts.org/facts

Massachusetts Transgender Political Coalition, October 2015, "Transgender Anti-Discrimination Hearing Recap," masstpc.org/transgender-anti-discrimination-hearing-recap

Boston Globe, Nov. 2015 "For Now, Transgender Rights Bill Stalls on Beacon Hill," bostonglobe.com/metro/2015/11/30/for-now-transgender-bill-stalls-beacon-hill/FIXdEa3Ryv3tWvipHg1iPO/story.html

Project Voice, July 2014, "Discrimination and Health in Massachusetts: A Statewide Survey of Transgender and Gender Non-Conforming Adults," tinyurl.com/project-voice-report

Transgender Equal Rights Coalition Fact Sheet

The Consequences of Not Having Equal Access Protections

The Need For An Act Relative to Equal Access in Hospitals, Public Transportation, Nursing Homes, Supermarkets, Retail Establishments, and all other places open to the public.

Shelter Discrimination

Kayla*, a 20-year-old transgender woman, sought services last year at a homeless shelter outside of Boston, after leaving an unsafe family home and weeks of couch surfing with friends. Unfortunately, one of the most difficult periods in her young life was made even more difficult when shelter staff refused to let her sleep in the women's dormitory.

Instead, Kayla was made to sleep on the floor of a dusty room used to store donated clothes located around the corner from the women's dormitory, where residents had proper beds and air conditioning. For a time she shared the donation room with another transgender woman who occasionally resided at the shelter.

"I felt very disrespected," says Kayla, an aspiring poet and lyricist. She complained to shelter staff regularly about her substandard sleeping arrangement, to no avail. "They just made it seem like, 'Oh, we're in charge. You have no say here. Stop undermining us.'" As a result, Kayla sought outside legal advice, and at one point the Massachusetts Attorney General's office spoke with the shelter director about Kayla's situation. Things got worse after that; Kayla says she was no longer allowed access to the donations room until 9 p.m. even though the shelter allowed all residents to access the dorms and shelter amenities at 6 p.m.

Fortunately, not long after that, Kayla finally found independent housing in Boston and left the shelter.

**Kayla is a pseudonym, used to protect this woman's privacy.*

Healthcare Discrimination

Like many young people just out of college, Mycroft Masada Holmes was grateful to have landed a job that provided health insurance benefits. Shortly after taking a job at the Arlington Street Church in Boston some years ago, Mycroft chose a primary care doctor near the church who was affiliated with his new health insurance plan and set up an intake appointment with her.

During the appointment, Mycroft came out as transgender while discussing medical needs and history. The doctor became visibly uncomfortable. "She really was not pleased and just more and more seemed to want to end the interview," says Mycroft. The doctor said she would treat Mycroft as she would any female patient, but his needs as a transgender person would have to be addressed by mental health professionals, "because that's a separate thing," Mycroft recalls her saying.

When Mycroft, who had educated previous healthcare providers about being transgender, tried nicely to explain that his transgender identity could not be separated from his medical care, the doctor seemed to become more irritated. "It was like I was doing something that was a problem," Mycroft recalls. Ultimately, the doctor suggested that Mycroft might want to find a different physician.

"It was strange, disturbing and upsetting," Mycroft says of the experience. He decided to find a more supportive doctor at a different healthcare facility.

Dining Establishment Discrimination

A restaurant in Peabody in 2010 denied entry to members of a social group for transgender women and their friends one night; on the grounds some of their driver's licenses did not match their appearance. When they challenged management about being denied entry, they were then told they were being denied entry based on the length of their skirts. These transgender women had previously patronized this establishment five times prior to this incident. (On the last occasion they were inside the restaurant the owner asked the group why they "didn't go into town, where your dress code would be accepted?")

After they were turned away, one of the founders of the social group filed a complaint with the town's licensing board. The licensing board mandated mediation, but the mediation was unsuccessful. Following the unsuccessful mediation, the group's founder filed a complaint with the Massachusetts Commission Against Discrimination.

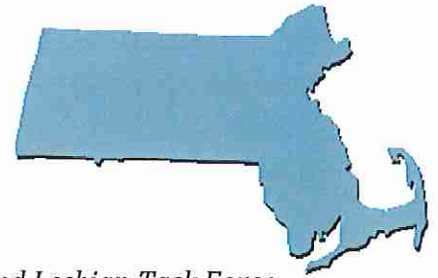
Ultimately, the local licensing board found that the restaurant had discriminated against the transgender women.

In November of 2011, the parties reached a settlement on the MCAD complaint, the details of which are confidential. However, as a result of the MCAD complaint, the restaurant's owner and its employees participated in sensitivity training around transgender people and transgender issues.

Findings of the

NATIONAL TRANSGENDER DISCRIMINATION SURVEY

by the National Center for Transgender Equality and the National Gay and Lesbian Task Force



Massachusetts Results

There were 283 respondents from Massachusetts.

Workplace Discrimination

Rates of discrimination were alarming in Massachusetts, indicating widespread discrimination based on gender identity/expression:

- 76% reported experiencing harassment or mistreatment on the job
- 20% lost a job
- 17% were denied a promotion
- 39% were not hired

Harassment and Discrimination at School

- Those who expressed a transgender identity or gender non-conformity while in K-12 settings reported alarming rates of harassment (79%), physical assault (31%) and sexual assault (11%)
- Harassment was so severe that it led 11% to leave a school in K-12 settings or leave higher education

Economic Insecurity

Likely due to employment discrimination and discrimination in school, survey respondents experienced poverty at over three times the rate of the general population:

- 15% of respondents had a household income of \$10,000 or less, compared to 4% of the general population¹

Housing Discrimination and Instability

Survey respondents experienced blatant housing discrimination, as well as housing instability, much of which appears to stem from the challenges they face in employment.

- 6% were evicted
- 17% were denied a home/apartment
- 10% had become homeless because of their gender identity/expression
- 22% had to find temporary space to stay/sleep
- 18% had to move back in with family or friends
- 25% reported owning their home compared to 67% of the general population²

Harassment and Discrimination in Accommodations and Services

Survey respondents experienced discrimination in public accommodations and services, including from government agencies and police, because of their gender identity/expression.

- 58% were verbally harassed or disrespected in a place of public accommodation or service, including hotels, restaurants, buses, airports and government agencies
- 22% were denied equal treatment by a government agency or official
- 9% were denied equal treatment or harassed by judges or court officials
- 24% of those who have interacted with police reported harassment by officers
- 50% reported being uncomfortable seeking police assistance when needed

Health Care Discrimination and Health Outcomes

- 14% were refused medical care due to their gender identity/expression
- 1.42% were HIV positive, compared to the general population rate of 0.6%³
- 25% postponed needed medical care, when they were sick or injured, due to discrimination
- 35% reported attempting suicide at some point in their life, 22 times the rate of the general population of 1.6%⁴

Bias-Motivated Violence

In questions related to experiences in educational settings, at work, in interactions with police and with family members, at homeless shelters, accessing public accommodations, and in jails and prisons, respondents were asked about physical violence and sexual violence committed against them because of their gender identity/expression. There was no general question asked about whether respondents had ever experienced any bias-motivated violence in other areas of life, such as while walking down the street.

- 18% had been physically assaulted in one of these contexts because of their gender identity or expression
- 7% were sexually assaulted in one of these contexts because of their gender identity or expression

Note: In the full report of the National Transgender Discrimination Survey, we found that discrimination was pervasive throughout the entire sample, yet the combination of anti-transgender bias and persistent, structural racism was especially devastating. One of our most important findings was that people of color in general fared worse than white participants across the board, with African American transgender respondents faring far worse than all others in nearly every area examined. Due to the sample size of respondents from this state, we were unable to break these state results down by race/ethnicity without creating small sample size problems. However, we expect that people of color in Massachusetts would exhibit the same national pattern.

"Injustice at Every Turn: A Report of the National Transgender Discrimination Survey," which provides the national results, is in press and will be available in February 2011 online at www.thetaskforce.org and www.transequality.org.

¹ U.S. Census Bureau, "Current Population Survey," Annual Social and Economic Supplement (Washington, DC: GPO, 2008).

² U.S. Department of Housing and Urban Development, "U.S. Housing Market Conditions, 2nd Quarter, 2009" (Washington, DC: GPO, 2009): http://www.huduser.org/portal/periodicals/ushmc/summer09/nat_data.pdf.

³ United Nations Programme on HIV/AIDS (UNAIDS) and World Health Organization (WHO), "2007 AIDS Epidemic Update" (2007): http://data.unaids.org/pub/EPISlides/2007/2007_epiupdate_en.pdf.

⁴ "U.S.A. Suicide: 2002 Official Final Data," prepared for the American Association of Suicidology by John L. McIntosh, Ph.D. Official data source: Kochanek, K.D., Murphy, S.L., Anderson, R.N., & Scott, C. (2004). Deaths: Final data for 2002. National Vital Statistics Reports, 53 (5). Hyattsville, MD: National Center for Health Statistics DHHS Publication No. (PHS) 2005-1120. Population figures source: table I, p.108. of the National Center for Health Statistics (Kochanek et al., 2004), see http://www.sprc.org/library/event_kit/2002datapgv1.pdf

At the meeting on May 21, 2015, the Arlington Human Rights Commission passed three resolutions regarding protections from discrimination based on gender-identity.

Resolution 1

The Arlington Human Rights Commission supports adding "gender identity and expression" to the list of protected classes regarding nondiscrimination in places of public accommodation in Massachusetts. We will publicly declare our support for the two current state bills, Senate Bill #735: An Act Relative to Transgender Anti-Discrimination and House Bill #1577: An Act Relative to Gender Identity & Non-Discrimination. This support might include newspaper opinion pieces, educational events, letters to state legislators, posts to social media, and the like.

Resolution 2

The Arlington Human Rights Commission's mandate is "to advance issues related to the fair and equal treatment of individuals, and to create a mechanism for addressing complaints arising out of these issues." We interpret this mandate to include issues regarding gender identity and expression. In addition to educational programs related to gender identity and expression, AHRC will accept and investigate official reports of discrimination based on gender identity or expression.

Resolution 3

The Arlington Human Rights Commission will work with other local equal rights groups to submit a warrant for the 2016 Town Meeting to change Arlington's Town bylaws to add "gender identity and expression" to the list of protected classes regarding nondiscrimination in Arlington.

<http://www.bostonglobe.com/opinion/editorials/2015/01/16/guaranteeing-crucial-element-transgender-rights/KTt0k2l7P26n5A2uvP3ltO/story.html>

EDITORIAL: Guaranteeing a crucial element of transgender rights

IN 2012, Massachusetts passed a landmark equal rights law — it made discrimination on the basis of gender identity illegal.

In so doing, the Massachusetts Transgender Equal Rights Act protected transgender people from being discriminated against in matters of housing, employment, credit, and public education. But at the last minute, legislators stripped a provision out of the bill regarding discrimination in public places. So a restaurant, for instance, could not refuse to hire someone — or fire them — based on gender identity, but it could refuse to serve them. And a transgender person could be denied use of a public restroom.

The absence of the “public accommodation” clause leaves a crucial hole in the law, one that state legislators in the last session tried to rectify. But an amendment proposed by Senator Sonia Chang-Diaz languished in the Senate. Now Chang-Diaz is set to resubmit the bill. The Legislature should move quickly to pass the amendment, and Governor Charlie Baker — who has expressed ambivalence about the provision — should support it.

A law that guarantees someone the right to employment but not a right to service is deeply flawed: You can work here, but you can’t eat here. But opponents have taken the bill to task as it applies to public bathrooms, derisively calling it “the bathroom bill.” It seems that lawmakers feel that the sanctity of gender-specific restrooms must be protected against those who were born as one gender and now identify as another. Yet it’s unclear what danger to the public a transgender person presents.

But the harm caused to transgender people by discrimination is real, and the public accommodation clause is not merely a social nicety. A Project Voice survey published last year conducted by the Fenway Institute and the Massachusetts Transgender Political Coalition found pervasive discrimination against transgender and “gender nonconforming” adults throughout the Commonwealth. The incidents the report cited included being prevented from using public bathrooms and denial of health care. What’s more, it’s widely known among the transgender community that the most unsafe place for a transgender person is a public bathroom, where violent attacks are most likely to happen. In one notorious case, a teenage girl was found guilty of beating a transgender woman outside a McDonald’s restroom in a Baltimore suburb. A video of the incident went viral.

Baker knows better. Transgender access to school locker rooms is already protected by the 2012 law. Despite his resistance to the public accommodation bill (going back to his 2010 gubernatorial campaign, when the openly gay state representative Richard Tisei, who supported the bill, was his running mate), he was an early supporter of gay marriage. His campaign touted the support of his openly gay brother, Alex. In a gubernatorial debate, he chastised as offensive the anti-gay comments made by an opponent. And last week’s inauguration featured a performance by the Boston Gay Men’s Chorus, the first performance by a gay chorus at a gubernatorial inauguration in New England.

The base of the Massachusetts Republican Party has not been as LGBT friendly, made clear in the party platform written last year. Here’s a chance for Baker to lead his party — and the state — with a vision the Commonwealth that is inclusive of all.

W.A. #19 Comments AHRC Executive Director W. Logan:

Here is what is proposed for the actual language:

Amend Title 2 Article 9 Section 3B(1) paragraph 2 of the Arlington Town Bylaws to state: “The members shall be sworn to the faithful performance of their duties, and shall serve until their successors are appointed and sworn. There may be an Executive Director if determined necessary by the Commission, whom shall be appointed by the Town Manager with consultation by the Commission.

Amend Title 2 Article 9 Section 3D1 paragraph 1 of the Arlington Town Bylaws to state: “Executive Director. The Executive Director shall be an employee of the Town and report to the Commission. The prospective Executive Director shall have demonstrable experience in human and civil rights, as well as proven ability to work cooperatively in a diverse community.

William J. Logan, Esq.
AHRC

W.A. #21 Comments ACAC Membership:

2.18.16

To: The Board of Selectmen

From: Barbara Costa, Co-chair, Arlington Commission on Arts & Culture

Barbaracosta331@gmail.com (also for Stephanie Marlin-Curiel, Co-Chair;
marlincuriel@gmail.com)

Re: Warrant Article Hearing 2.22.16

ARTICLE BYLAW AMENDMENT/ ARLINGTON COMMISSION ON ARTS AND CULTURE MEMBERSHIP

To see if the Town will vote to amend Title II, Article 8 of the Town By-laws to increase the number of members of the Arlington Commission on Arts and Culture from seven to nine; or take any action related thereto.

(Inserted at the Request of the Arlington Commission on Arts and Culture)

The Commission on Arts & Culture (ACAC) has voted to request a warrant article to amend a bylaw to allow us to have a total of 9 commissioners instead of the current 7.

We are making the request for 2 additional Commission members in order to help with our workload, as well as to bring additional perspectives and voices to the Commission. We are embarking on preparation toward a cultural planning process, which will involve a lot of time on the part of the Commissioners. We are also applying to the Massachusetts Cultural Council (MCC) for a Cultural District designation for Arlington and will need to oversee its implementation, if we are approved by MCC.

Current wording in our bylaw states:

"Six members, one of whom shall be a member of the Vision 2020 Culture and Recreation Task Group, shall be appointed by the Town Manager subject to the approval of the Board of Selectmen and one member shall be appointed by the School Committee."

We recommend (though this has not yet been voted upon by ACAC):

"Eight members... shall be appointed by the Town Manager subject to the approval of the Board of Selectmen and one member shall be appointed by the School Committee."

We have discussed the above with Town counsel, Doug Heim.

Please let us know if you have any questions. Thank you for your consideration.

W. A. #25: Demolition by Neglect, filed by Carol Kowalski and ten registered voters:

The Arlington community believes in preserving its historic buildings. Town Meeting adopted both historic districts and demolition delay bylaws. Unfortunately, there is a destructive phenomenon known as “demolition by neglect” that neither the historic districts nor the demolition delay bylaw can prevent. The filing of a building permit to alter or demolish a historic building usually triggers the building department to direct a property owner to first apply for a hearing with historic districts commission or the historical commission. But what if the building is intentionally being left unoccupied for years despite sustained interest in leasing or purchasing to occupy the building? What if, over time the owner allows it to become vandalized, or rotted from the elements entering through a roof opening, or catches fire, and is now too far gone to save? By then, the historic building is lost, and the property owner is free to apply for a building permit despite the willful, destructive neglect of the historic property. The owner has essentially achieved the demolition of the building without applying for a demolition permit, and by skirting the Town’s preservation bylaws. This phenomenon is known as demolition by neglect.

I believe that for the last seven years, we have been witnessing demolition by neglect of the Dr. Atwood House at 821 Mass Avenue. I have communicated several times with a member of the family that owns the house. They simply want it gone. At one time, they intended to replace it with a free-standing Automated Teller Machine. Can you picture an ATM machine right next to the beautiful First Baptist Church?

The Dr. Atwood House is known as an American Four-square, and it was one of a row of three such grand homes that lined Mass Ave here. John Worden wrote a detailed pair of articles in 2010 in the Arlington Advocate that I recommend, and I can’t improve upon. This is the last vestige of that historic streetscape, and the house serves as an effective architectural transition between the commercial setting of the CVS and the sacred architecture of First Baptist Church. The interior of the house, at least until 2013 when I was last inside with a preservation architect, still had its remarkable hand-carving and stained, leaded glass. Viable offers to re-use the house have been proposed to the owners repeatedly, including twice by the Housing Corporation of Arlington, as recently as 2014, but are consistently rejected.

If in future instances of demolition by neglect, if it is found that lack of resources contributed to the neglect by an owner, preservation grants, private fund-raising and the Community Preservation Act would be possible sources to assist the owner in the preservation of an architecturally or historically significant building. It does not appear to me, based on the facts, that financial resources are an issue in the case of the Atwood House.

The proposed bylaw would allow the commission to hold a hearing with the owner of such an unoccupied historic building to determine if demolition by neglect is occurring, and to induce the owner to establish a schedule of repairs and activities to repair and protect the building. If eventually the owner refuses and the disrepair results in a loss, the owner would be prevented from receiving a building permit for a specified number of years following. I propose two years, for parity with the Town’s demolition delay bylaw penalty. Town Meeting should have the opportunity to consider this warrant article before the “Dangerous Vacant Building” sign is ordered to be posted warning that firefighters shouldn’t even enter the building. By then, it’s too late.



OFFICE OF THE BOARD OF SELECTMEN

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STEVEN M. BYRNE
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730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 9, 2016

Dear Registered Voter:

The Board of Selectmen will meet on Monday, February 22nd at 7:15 p.m., Selectmen's Chambers, 2nd Floor, Town Hall, to discuss the Warrant Article petition that you signed.

Article 25 Bylaw/Demolition by Neglect of Historic Buildings

Please feel free to contact Mary Ann or Fran in my office at the above number to confirm or if you require any further information.

Thank you.

Very truly yours,
BOARD OF SELECTMEN

A handwritten signature in cursive script, reading "Marie A. Krepelka".

Marie A. Krepelka
Board Administrator

MAK:fr

ARTICLE BYLAW/DEMOLITION BY NEGLECT OF HISTORIC BUILDINGS

To see if the Town will vote to adopt a general bylaw to prevent the loss of historic buildings from neglect leading to irrevocable deterioration; or take any action related thereto.

(Inserted at the request of Carol Kowalski and ten registered voters)



**Demo by neglect of Historic
Building – Carol Kowalski**

Clarissa Rowe
137 Herbert Road
Arlington, MA 02474

Carol Kowalski
182 Scituate Street
Arlington, MA 02476

Mr. & Mrs. John Worden
27 Jason Street
Arlington, MA 02476

Richard Duffy
122 Appleton Street
Arlington, Ma 02476

Catherine Garnett
263 Washington Street
Arlington, MA 02474

Karen Johnson
88 Woodside Lane
Arlington, MA 02474

Ann LeRoy
12 Peirce Street
Arlington, MA 02476

Joshua Lobel
73 Jason Street
Arlington, MA 02476

Keith O'Boyle
16 Gay Street
Arlington, MA 02474

Carol Phipps
16 Gay Street
Arlington, MA 02474

Brian Rehrig
28 Academy Street
Arlington, MA 02476



Town of Arlington, Massachusetts

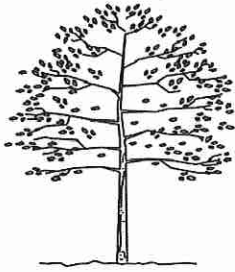
Thank You Selectman Dunn

Summary:

Mary Ellen Aronow, Arlington Tree Committee Co-Chair

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Tree_Committee_CR.pdf	Letter from Tree Committee



**ARLINGTON
TREE
COMMITTEE**

*www.arlingtontrees.org
ArlTreeCmte@gmail.com*

Mr. Dan Dunn
Arlington Board of Selectmen
730 Massachusetts Ave
Arlington MA 02476

February 12, 2016

Dear Mr. Dunn,

The Arlington Tree Committee thanks you for your commentary in response to the removal of a town tree in the tree strip at 11 Kipling Road at the February 10th Board of Selectmen's meeting. Your mention to the Selectmen of the broader topic the tree removal at 11 Kipling Road represents is very much appreciated by the Tree Committee.

We prepared statements for the meeting to address the same comments you made highlighting the need for consideration of public tree removal early in the decision and planning. The Arlington Tree Committee is working to make certain that those undertaking construction in town are aware of and are complying with the existing Mass. General Laws, Chapter 87, which govern public shade trees. The Committee greatly regrets not having arrived in time for the discussion on February 10th.

We thank you again for representing the Arlington Tree Committee's objection so thoughtfully.

Sincerely,

Mary Ellen

Mary Ellen Aronow
Co-Chair
Arlington Tree Committee
617-306-6786

Cc:
Maria Krepelka (mkrepelka@town.arlington.ma)



Town of Arlington, Massachusetts

NEW BUSINESS



Town of Arlington, Massachusetts

EXECUTIVE SESSION



Town of Arlington, Massachusetts

Next Scheduled Meeting of BoS March 7, 2016.